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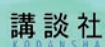
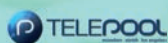


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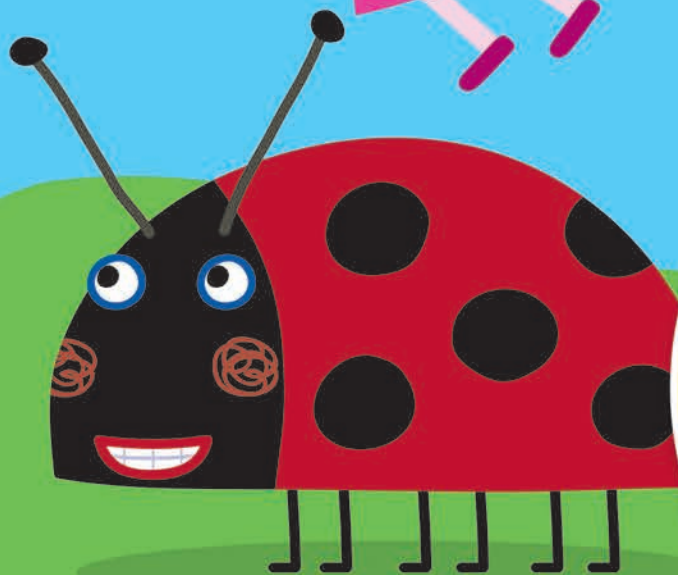
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Cover Our cover features an ad for Mediatoon's new 52 x 13-minute animated comedy *The Crumpets*, while our inside editorial cover features the core cast of new Sesame Workshop/CBeebies co-pro *The Furchester Hotel*.



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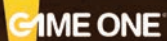
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Editorial

Striking a balance

If you haven't already, check out Jim Benton's cartoon on page 32 of this issue. Always prescient, Jim gets to the heart of kids' current relationship with technology—they are engrossed by it. And not unlike their parents, they're afraid to look up from their tablets, should they miss out on anything. Not surprisingly, tech, computing and coding are making their way into programming.



To ignore their influence would be foolhardy on the part of broadcasters and producers. In fact, just as this issue was going to press, BBC Children's, along with partner BBC Learning, had announced an extensive cross-platform program designed to help teach UK kids about computing, coding and

digital creativity. Along with new linear series like *Appsolute Genius*, starring CBBC's Dick and Dom, the program features online initiatives and some big changes to curriculum site BBC Bitesize. And if coding, in particular, is a form of 21st century literacy as many educational experts have deemed it, then it makes even more sense that the public kidcaster is reinforcing the nation's new public school computing curriculum through programming that aims to help kids make sense of it all. And in this field, BBC Children's is arguably out in front. I would be hard-pressed to think of a broadcaster that's instituted a formal plan around computing and coding with this kind of reach.

In some ways, BBC Children's and the UK public school system's recent initiative is an expression of the teach-kids-to-code movement that's been bubbling away for almost a decade. In this issue, Online Writer Daniela Fisher interviews the minds behind the new *ScratchJr* app (page 65), which is designed to teach five to sevens coding basics. It builds on Scratch, the language created by MIT Media Lab's Lifelong Kindergarten Group in 2003 with the goal of introducing kids to coding. Since the debut of Scratch, we've seen the likes of Tynker, volunteer org CoderDojo and Sweden's Codarica (currently taking part in Disney's 15-week Accelerator program for tech startups) emerge with largely the same purpose—to get kids coding and computer literate as soon as possible.

So, it makes perfect sense that what kids are watching should come to reflect their ever-growing interest in the use of technology. But I think show creators, producers and programming executives have to weigh the desire to be cutting-edge against a need to nourish kids' imaginations, dreams and basic humanity. A recent study conducted by UCLA warns that too much tech time can affect kids' ability to read other people's emotions. In short, the study, which looked at two groups of 11 to 13s, found that too much time spent staring head-down at a phone or tablet impedes the face-to-face interaction that enables emotional literacy—something we all need, if we hope to get along in this world. So please don't all jump on the tech train. There is room to strike a balance. What is great TV, if it's not something that teaches us a bit about how to recognize things like humor, desire, anger, hope and regret—even when it comes in the form of a sarcastic animated rabbit regularly driving a neurotic duck into a state of apoplexy? (Thanks Bugs and Daffy!)

Cheers,
Lana

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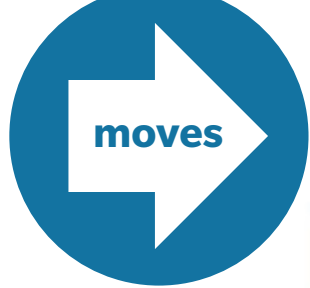
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The List

Five things on our radar this month

1 Canada's pick-and-pay panic

Canada's broadcast regulator, the CRTC, has proposed a pick-and-pay system for cable TV channels that the country's kidcasters and producers fear could result in fewer viewers, less advertising revenue, and ultimately fewer Canuck kids shows getting made. "Regulated à la carte is a recipe that will eventually lead to the obliteration of the Canadian broadcasting system that we know and enjoy today," Corus Entertainment wrote as the regulatory body was preparing for its Let's Talk TV public hearings scheduled to take place this month. The proposed changes also arrived as DHX Media was creating a new division, DHX Television, which is now home to its recent broadcast acquisitions—The Family Channel, Disney XD Canada and Disney Junior Canada (French and English). The CRTC is hoping to implement changes by December 2015, but given the divisive nature of the proposal, and the relative strength of the production and broadcast lobbies in Canada, that seems a little optimistic.



photo: US CPSC



2 A quick turnaround

While most people thought Rocket Raccoon would be the break-out character from Marvel's *Guardians of the Galaxy*, the film's lovable talking tree Groot has received more attention. The myriad fans who posted videos of DIY Groot toys after the film's August debut will soon be able to buy the first official one—a Dancing Groot bobble-head from Funko Toys. Disney Consumer Products has been quick to respond this time. Here's to hoping there won't be stock shortages of the Frozen kind.



photo: Laura

3 ANY state of post

Since New York State enhanced its post-production tax credit in 2012, 140 productions have applied for work and 13 post companies have opened for business. Figures from NY's Empire State Development corp. also show that Nick's *Dora and Friends: Into the City* recently spent US\$1 million on post-production, hired 80 residents, and generated US\$5 million in local NY spending. As California moves closer to boosting its own tax incentives for post, expect competition in the US to heat up.




4 Go big and stay home

Size matters with the Nabi Big Tab from Fuhu. The giant new device is roughly the size of an iMac. With a whopping 24-inch screen, it's proving perfect for multi-play. Retailing for US\$549, Big Tab gives kids a highly sharable screen. While Fuhu has proved its worth, selling more than 1.5 million regular-sized kids tablets, it remains to be seen if families will embrace the large-format tab in their already device-ridden homes.



5 TRU's new debt plan

Toys 'R' Us might be browsing the debt refinancing aisle. The retailer's major investors—KKR, Bain Capital and Vornado Realty Trust—have reportedly hired Goldman Sachs to negotiate its long-term debt, reportedly around US\$5 billion. Financing changes, thanks to today's strong credit market, would give TRU some extra breathing room before the company's next big repayment of US\$1 billion comes due in fall 2016.

 To keep up with the news as it happens, check out Kidscreen.com daily.

The Deep swims into production

Nerd Corps's first international co-pro is on track with A Stark and Technicolor



Australia/Canuck co-pro *The Deep* takes a creator-driven storytelling approach

France-based Technicolor and Australia's A Stark Production have welcomed Canada's Nerd Corps Entertainment as a co-production partner on their CGI adaptation of Tom Taylor's hit graphic novel *The Deep*.

Commissioned by ABC Australia and Seven Network, the 26 x half-hour adventure series targeting kids eight to 12, and their families, is being distributed internationally by Technicolor (excluding Canada, Australia and New Zealand), and has been pre-sold to Germany's Super RTL.

Taylor, a bestselling Australian comic book author and playwright whose other credits include *Batman: Legends of the Dark Knight* and *Star Wars: Blood Ties*, is serving as head writer on the TV series with *The Deep*'s illustrator James Brouwer (*Justice League Beyond*) on-board as art director.

"The challenge of co-productions, sometimes, is to not dilute the creative and what we're doing is keeping the creative at the heart of the show," says Alison Warner, Technicolor VP of IP sales and acquisitions.

Published as a standalone novel by Gestalt Comics, *The Deep* follows the adventures of a family of underwater explorers. The Nektons live aboard the state-of-the-art submarine, Aronnax, while exploring the deepest recesses of the Earth's oceans.

The family includes 12-year-old Antaeus (Ant); his 15-year-old sister and crack navigator, Fontaine; and their parents Will, an oceanographer, and Kaiko, a marine biologist.

A Stark Production is handling pre-production on the series, including music, designs, scripts and storyboards, while Nerd Corps is tasked with animation production (CGI modeling and animation through to final picture and sound production).

Nerd Corps founder and CEO Asaph Fipke says storyboarding on the first two episodes is complete, modeling has commenced, and animation will begin within weeks. Delivery is expected to begin in April 2015 and wrap up by the second quarter of 2016.

"It's a unique project for us because we really haven't done a co-pro before," Fipke says. "There have been some challenges, as there always are, in terms of birthing an amazing new series—lots of conversations around story and design, and working through the differences of graphic novel storytelling versus what works for TV. It's been an interesting process and quite enjoyable."

Some specific production challenges, according to Fipke, have involved animating three different types of action—land-based, surface water and underwater. "These present a whole bunch of technical challenges that we haven't delved into before. Making water in CG is always a challenge. But the idea going into this project is that we want to own the underwater world in TV animation, so *The Deep* as a brand, and where we go with it, is of great interest to us."

Warner says she believes there are great opportunities for the series despite the ongoing market demand for comedies. "We've had quite a few broadcasters actually say they are now looking for adventure shows because they are almost comedied out. Our series does have naturally comedic moments, but it is an adventure show first," she says.

Looking ahead, Fipke and Warner both foresee the brand expanding into the interactive space and consumer products realm. "Discussions around brand extension licensing opportunities are ongoing," says Warner. "But first, we must ensure we preserve the integrity of the show." —Jeremy Dickson

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Converging content



On-demand kids entertainment platform BuddiesTV brings a raft of Western children's programming to the East

With internet use on the rise in China—632 million web users and counting, according to China Internet Network Information Center—no Netflix in the region, and 83% of the country's web users now accessing the internet via mobile devices, Ciwen Kids has been quick to tap the kids market. It's recently lined up a string of partnerships with several international distributors to expand the library of its new cross-platform kids content service BuddiesTV.

Two years in the making, BuddiesTV is the brainchild of Sean Chu, VP of Ciwen Kids, a division of Beijing-based Ciwen Media Group.

"Because of regulations, Chinese kids haven't had access to Western animation and programs, so we looked at how we could utilize new streaming technology to bring quality programming to kids," says Chu.

The service launched in June and now reaches mainland China, Macao and Hong Kong. It's currently available across most streaming platforms with partners including IQiyi and Tencent Video (online streaming), BesTV (IPTV) and Xiaomi Media Box and Tmall Box (OTT). It's also accessible via iOS and Android apps and has branded slots on traditional TV.

Among the platform's popular animated programs, which are all dubbed or subtitled for the Chinese market, are *Franklin and Friends*, *Babar*, *Jelly Jam* and *Slugterra* from producer/distributor partners including Nelvana Studios, Nerd Corps, Vodka Capital and DQ Entertainment.

Ciwen Media Group has also inked a deal with Zodac Kids for more than 390 episodes of programming, and

Ciwen is serving as a regional distribution agent across free TV, cable and satellite, home entertainment and VOD platforms.

With new content and L&M announcements coming soon, Chu is pleased with the early buzz and potential for future growth. "It took us a while to bring these shows online because we needed time to do the localization, but so far we've done well. Financially, it's healthy." He adds that Ciwen pays for programming, and that each platform partner has its own monetization and business model for BuddiesTV.

"For OTT and IPTV, consumers pay a little more money for ease of access. For online, the service is free, but there is advertising. For iOS, we only charge US\$1 per month for all the programming," he says.

With no promotion, BuddiesTV for iOS devices landed in the top-10 list for kids animation content in China, just two weeks after launching on the Apple App Store.

Chu says the company's focus now is to develop the Chinese market and look for more acquisitions outside China. It's also in production on a movie co-pro based on *Slugterra* with new characters and Eastern storylines, and expects to develop original IPs with partners outside China.

The biggest challenge, says Chu, has been working around China's complicated government regulations for broadcasting. "In China, everything is moving so fast. The business activities are moving faster than the regulation, so we have to be careful." —Jeremy Dickson

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Tib and Tumtum is the latest series to join GO-N's growing development slate



A GO-ing concern

As it celebrates 10 years in the biz, French prodco GO-N is firing on all cylinders with a revamped slate

It's not often that you see a child and a T-Rex become best of buds, but in *Tib and Tumtum*, the latest series in development from Paris-based prodco GO-N Productions, the pairing is a perfect fit. That's largely because Tumtum is more lovable pet than mighty monster.

The dino series is just one of a host of new projects in the works for GO-N. The company, founded in 2004 by Eric Garnet and Anne de Galard, is seeing its biggest successes at it celebrates 10 years in the animation business.

The French prodco has a number of new projects on its plate for this fall. First off, its quirky animated comedy *ZipZip* (52 x 13 minutes) will launch at MIP Junior next month. Produced in digital 2D, with partners Super RTL in Germany and France Télévisions, the show targets kids ages six to 10. It follows a crew of crafty wild animals

who disguise themselves as house pets to enjoy a cushy life in the suburbs.

GO-N has also inked a development deal with France 5 for *Simon* (52 x five minutes), based on a series of preschool books by author Stephanie Blake. Garnet and team are currently working on a five-minute pilot episode, which will bow in 2015. The series follows young bunny Simon, taking what Garnet describes as a very cute but more realistic approach to growing up. "Basically Simon dares to say out loud what children think," explains Garnet.

GO-N's other project is the comic-turned-animated-series *Tib and Tumtum* (52 x 13 minutes). The prodco is in a development deal with TF1 France on the 2D animated comedy/adventure for the kids ages five to eight. "For *Tib and Tumtum*, it was really love at first sight when we saw the book," recalls Garnet, who hopes to start production on the series next year. Set in prehistoric time, the show follows Tib, whose birthmark sets him apart from the other kids, and his best friend, the mischievous dino Tumtum. GO-N is also currently in production on season four of animated comedy *Titeuf* (75 x seven minutes) with France Télévisions, Lagardère Group France, RTS Switzerland and RTBF Belgium. —Daniela Fisher

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After working in Europe for 15 years, **Mary Bredin** moved back to Canada in 2007. Now at the best job she's ever had, the TV vet credits most of her success to determination, and a little to chocolate chip cookies

Persistence pays off

The gig Guru Studio VP of development and acquisitions, focusing on original content development and new IP acquisitions, but involved in all aspects of running the studio.

Beginnings As a kid growing up in an artistic household in Toronto, Bredin was a big fan of Penelope Pitstop, the race-car driving, butt-kicking beauty from Hanna Barbera's classic 1960s animated series *Wacky Races*. After finishing high school and delving into artistic studies at McGill, she had a brief kick at journalism and even considered becoming a theater director before realizing it would be a challenge to earn a living. Not entirely sure what to do, Bredin decided to give law school at the University of Toronto a try. "I never really aspired to be a lawyer," Bredin says. "But trying to make some money, in a family that wasn't making any money, seemed to be one motivating factor."

After passing the bar, she realized she wanted to parlay her new skills into a creative career. "I knew some sort of production or administration of creative work was best suited for me," she says. Fortunately for Bredin, the firm where she articulated had done a lot of work with Toronto-based children's entertainment producer Nelvana.

Big break A good word was put in for Bredin and she managed to secure an interview. "I remember I had just been dumped by my boyfriend at the time, and the interview was on a Saturday before Christmas so, as a nice gesture, I brought homemade chocolate chip cookies," says Bredin. "I think those got me the job."

With her foot finally in the door, she stayed at Nelvana in business affairs for three years before heading to Europe. "Nelvana gave me my break and taught me so much. What I learned there in three years has kept me going for my whole career," she says.

While in Europe, Bredin began to make her move from the legal side of the business to content development. She says she got a sense of it while working at a production company in Paris, where she helped work on English language scripts and materials.

According to Bredin, her career-defining moment came at the beginning of her seven-year stint with Disney. One year in as a lawyer, her friend Emmanuelle Petry, a former long-time sales exec for Nelvana, suggested to Disney's head of programming that Bredin would be a good fit as an acquisitions executive.

"I moved over to acquisitions and programming in the fall of 1998 and haven't looked back," says Bredin. (She adds that winning a Canadian Screen Award for Guru original series *Justin Time* was a nice accomplishment, too.)

Comfort zone Now with seven years in the bag at Guru, Bredin says she's inspired by all of the amazing artists at the company, and by the vision of president and creative director Frank Falcone, in particular. She says the biggest challenge is always finding new shows, believing in them and sticking with them. "Persistence is one of the hallmarks of my career," she says. Looking forward, Bredin says she's excited to work on new shows for Guru like *Dinopaws* and is thrilled with the launch of the company's new interactive division, Guru Arcade. "I've worked in three different countries and had eight jobs, so I am very lucky to be doing what I'm doing now." —Jeremy Dickson



Dinopaws is a new international co-pro from Guru, Treehouse, Laughing Gravy, Kindle Entertainment and CBeebies

Out of Office

Tales from the frequent fliers club



Don Moody

Founder & executive producer, Moody Studios

1. In my carry-on

My luggage, so they don't charge me.



2. My go-to gadget

A pillow

3. On the fly

I pretend to sleep until I fool myself.



4. Preferred in-air tunes

ZZZZZZ

5. Best in-flight food

I eat before I leave, so I just lick my teeth.



6. Best power lunch

Cold coffee and the rest of the croissant from breakfast.



7. Window or aisle?

I like to stand in the bathroom line even when I don't have to go.

After months of speculation as to who would head up Cartoon Network after Stuart Snyder vacated in March, Turner Broadcasting has tapped **Christina Miller [A]** as the new president and GM of Cartoon Network, Adult Swim and Boomerang. She replaces Snyder, who was president and COO of Animation, Young Adults & Kids Media.

As the former SVP of the net's CP division, Cartoon Network Enterprises,

was SVP of brand licensing for preschool house HIT Entertainment, now a division of Mattel.

Speaking of HIT, five months after announcing a restructure of its consumer products division, FremantleMedia Kids & Family Entertainment is adding more talent. Former HIT Entertainment exec **Henry Or [B]** has come on-board as Fremantle's new VP for Kids & Family Entertainment in Asia. Previously

lines for EMEA. Rounding out the CP personnel lineup is **Nicola Hermann**, who has been named global brand director. Previously, Hermann was head of brand marketing at Zodiak Rights. She and Griffiths will work from Fremantle's offices in London, while Or will be based in Hong Kong.

The new VPs are responsible for developing local strategies for their respective regions. They'll work to build the licensing

currently works as a media company advisor and visiting professor at UCLA's Anderson School of Management. This followed a 13-year career with MGM, where his most recent role was SVP of Television Operations, overseeing financial operations, forecasting and analysis.

The animation studio also recently promoted **Tara Kemes [C]** to a newly created VP of culture and talent position. She is now charged with wooing

Station game *Ratchet and Crank*—Rainmaker needs to ramp up.

Speaking of hit properties, Toronto, Canada-based Tricon Films & Television's hit series *The Next Star* has returned to Canuck kidcaster YTV for a seventh season, making the TV talent series one of Canada's longest-running. As the indie producer looks to move beyond a foundation in kids and family reality programming to animated and scripted

people



Miller is no stranger to the CN family. In her new role, she will lead the business in North America, working with Turner International to create short- and long-term goals, as well as a global strategic plan to more closely align the kids business. Just prior to the appointment, she served as GM of NBA Digital and SVP of Turner Sports Strategy/Marketing/Programming. And before her days at Turner, Miller

the director of Asia for HIT, Or brings a wealth of experience to his new VP role. He will have overall responsibility for the kids business in the region, including growing Fremantle's CP business.

The division has also hired former HIT exec **Tracy Griffiths** as VP of licensing and consumer products for EMEA and Australia. Griffiths comes to the role from a position as group director of soft-

programs, manage local agents and licensees, and generate new business. The hires are intended to boost Fremantle's global presence, turning current and future brands into international franchises.

Also stepping up its recruiting game is Rainmaker Entertainment. The Vancouver, Canada-based studio has appointed **Steve Hendry**, a former MGM executive, to its Board of Directors. Hendry

creative and technical talent. Most recently director of talent development, Kemes will aim to distinguish Rainmaker's culture from rival Vancouver houses that are also chasing the animation industry's best and brightest artists and techs. With two feature-length animated films currently in production—a Barbie direct-to-DVD movie for Mattel and a theatrical release based on the bestselling Sony Play-

fare, the company has hired **Frank Saperstein [D]** as EVP kids, family and animation to spearhead the division.

In line with the new strategy, Saperstein will be responsible for developing and producing more animated and scripted kids, tween and family projects. Beyond traditional TV shows, Tricon will also move in new directions on

➞ CONTINUED ON PAGE 30

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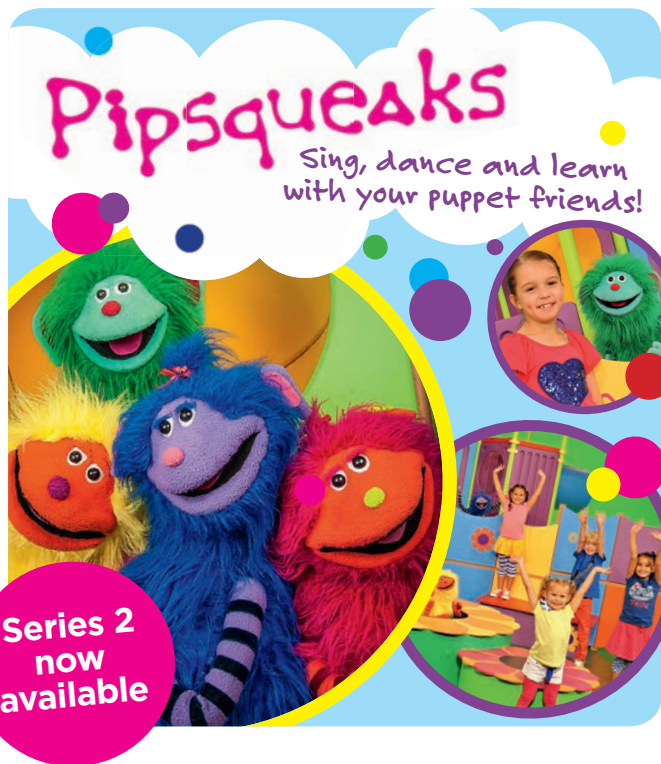
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YOOA

Rai

true visions

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people



the scripted side, including pursuing interactive digital media, YouTube, Netflix and other non-traditional distribution channels. Saperstein, a veteran executive producer, writer and director, recently ran his own boutique development and production shingle, Surprise Bag. Before that, he was SVP of family TV for Entertainment One, and had previous executive stints at Blueprint Entertainment, Philippine Animation Studio and VH1/MTV Networks. For the new position, he will be based in L.A.

Meanwhile Genius Brands International is ramping up its licensing business with the appointment of industry vet **Stone Newman [E]** as the brand management company's president of global consumer products, and **Lloyd Mintz** as VP of consumer products. Newman jumps over to GBI from boutique

licensing agency Art + Science International, a company he founded and represented many tech companies, character and fashion brands and fine artists. Mintz, meanwhile, joins Genius from his own consultancy firm established in 2000, where he negotiated more than 150 licensing agreements on behalf of clients.

Newman and Mintz are now responsible for building consumer products programs for the company's existing brands including Baby Genius, Secret Millionaires Club, Stan Lee's Mighty 7 (SLAM 7) and Thomas Edison's Secret Lab. They'll also oversee licensing for GBI's wholly owned subsidiary, A Squared Entertainment, which manages such properties as Psycho Bunny, From Frank, Celescence Technologies, WowWee brands, ElectroKidz, MiP and Archie Comics.

On the circuit

Notes for the industry travel diary

October 7 - 9

Fall Toy Preview • Dallas, Texas

www.toyassociation.org



The Toy Industry Association's annual buyer-focused event is where influential decision-makers from mass, long-lead and high-volume specialty retail outlets go to preview products, and meet with toycos. And at this year's edition, they'll scope out products for Q4 2015. Also this year, Industry org Women in Toys will be hosting a full-day workshop Winning Moves on October 6, which includes seminars that are open to all Fall Toy Preview attendees.

October 13 - 16

MIPCOM • Cannes, France

www.mipcom.com



It's almost time for MIPCOM. This year marks the 30th anniversary of the annual autumnal event. The global market for entertainment content takes place this October. Industry leaders will converge in Cannes for four days of meetings, screenings and conferences. This year's event will draw an estimated 13,500 participants, over 4,600 buyers and 2,100 exhibiting companies.

December 3 - 5

Asian Animation Summit • Hanoi, Vietnam

www.asiananimationsummit.com



Heading into year three, Kidscreen's Asian Animation Summit has earned its reputation as great place to discover the region's best new animation concepts first. This year's event, taking place in Vietnam's beautiful capital city, promises to give attendees the earliest look at 24 outstanding development projects from Australia, Korea, Malaysia, Thailand and beyond.

For more People Moves, head over to kidscreen.com/category/people-moves

A full listing of Industry Events is available at kidscreen.com/events

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Building a brand

Writer/ animator **John Derevlany** opens up about his unique working relationship with Lego that spawned the TV series and mythology behind its hit multiplatform IP **Legends of CHiMA**

Who Ever since he can remember, John Derevlany (*Endangered Species*, *Wayside*) has been obsessed with Lego. He loved it as a kid and his passion for the iconic brick building toy continued into adulthood as the California-based animator's career took flight.

Derevlany spoke with *Kidscreen* about how he turned his obsession into an actual job with Lego—namely crafting the TV series and co-creating the mythology for hit boys property Lego *Legends of CHiMA*. He also talks about the process of developing stories for the immersive and original toy-based fantasy adventure brand and his long-term plans to enhance stories by incorporating 3D printing elements.



How did you seal the deal with Lego to become the co-creator of *Legends of CHiMA*?

I had heard they were looking to develop a new project, so I met with them at Kidscreen Summit in 2011. One of the things I showed them was a video I made of myself as an animated Lego minifigure who asks to work on their next big project. I was going to animate my whole resumé, but I thought they might think I was crazy. In the end, the position came down to me and someone else, and I think the video helped cinch it for me.

Legends of CHiMA season three just debuted. You've also co-created the mythology for the toys. Where do the ideas come from for such an expansive world?

A lot of the ideas come from kids in focus groups. Initially, Lego knew the concept had something to do with humanoid animals fighting each other. Kids said they loved the idea and liked a lion as the hero and a crocodile as the bad guy. From there it was like, go! The great thing about Lego is they brought me in really early in the development, so I got to work with the toy creators and the artists and illustrators. I was writing the characters, themes and mythology at the same time they were developing the toys. We worked hard to create a story and a narrative that worked with the toys. I had to create a world where they all make sense.

How did you develop story ideas for the videogames?

In addition to mapping out story arcs for the seasons, we also mapped out about 50 transmedia ideas that didn't fit directly into the series. The game for Nintendo 3DS and Sony PlayStation Vita came from one of those ideas, and the concept for the online game was based on a character that only shows up in one episode. The interesting thing about *Chima* is the entire narrative is almost designed like a game, partly so it works in these other formats.

Lego's unique sense of storytelling appeals to adults and kids. Do you approach *Chima* the same way?

I write kids shows as you would write an adult show. There are some really sophisticated things that I'm surprised ended up in the series, like discussions about spiritual beliefs and politics. I hope some of it sinks in with kids. My scripts are also more visual-based than

dialog-based. We try for as few lines of dialogue as possible, but sometimes I still end up with 150 to 200 lines in a half-hour episode.

What's next for you?

One of my long-term goals is to develop stories for shows that can be continued or enhanced by downloading a 3D-printable file. The infrastructure isn't there yet, but we're in this great period where a couple of people in a room can create a pretty high-quality animated show with their laptops. And in a few years, those same two people will be able to produce and distribute toys by selling downloads directly to kids. —Jeremy Dickson

Know your audience

By Jim Benton



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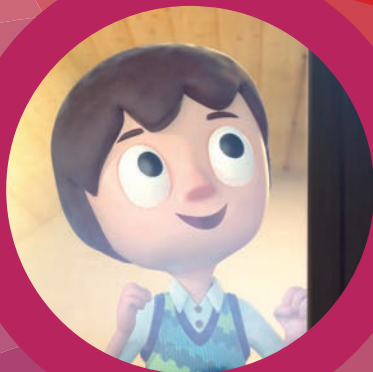


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Preserving a legacy

An inside look at how the beloved Peanuts seasonal specials are heading into ultra hi-def 4K territory as they celebrate 50 years on television this fall

BY JEREMY DICKSON

When New York-based Iconix Brand Group formed joint-venture Peanuts Worldwide in 2010 with the heirs of Peanuts creator Charles Schulz, the company knew it had a responsibility to take the multi-generational property into the future in creative and innovative new ways.

Recognizing the rise in digital media and mobile device usage, it quickly set Snoopy up on social media (the beagle has 300,000 Twitter followers and more than seven million Facebook fans), launched apps, secured video partnerships with Vine and Instagram, and announced that the first-ever CG-animated Peanuts feature from Twentieth Century Fox and Blue Sky Studios would hit theaters on November 6, 2015.

But before Charlie Brown and the gang make their big-screen debut in 3D, Peanuts Worldwide is refreshing the brand for television.

On November 8, France 3 will launch the first of 500 new Peanuts shorts from Normaal Animation and France Télévisions. And in December, Peanuts Worldwide will mark the property's 50-years-on-TV milestone with Disney-owned US broadcaster ABC by launching perhaps its biggest, most ambitious project and event yet.

4K future

"When we first put our plans for Peanuts in place, it occurred to us that the 50th anniversary of the Christmas and Halloween specials was approaching," says Leigh Anne Brodsky, MD of Peanuts Worldwide. "So we started to think about the idea of restoring the specials because they play such an important role in TV history."

Kim Towner, SVP of media production and programming for Peanuts Worldwide, says the company immersed itself in understanding how to future-proof the specials, which have drawn consistently strong ratings on US primetime network television since *A Charlie Brown Christmas* made its ABC debut on December 9, 1965.

The long Long Holiday

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Ultimately, the company determined that a 4K restoration would be best because Ultra High-Definition TV (UHDTV) is on the cusp of becoming mainstream, and is not expected to go the same route as the gimmicky 3D televisions that launched a few years back.

"4K is the future. We saw the trend coming, so we jumped on it," says Towner.

While the format, which uses four times as many pixels as regular HD content, has yet to achieve mass-market appeal, most major manufacturers have 4K TVs available, prices are dropping (to about US\$2,500 on average), screen sizes are shrinking, and demand is growing.

In August, Taiwan-based Digitimes Research predicted that global shipments of Ultra HD TV units will reach 68.2 million in 2017—up from 1.5 million units shipped worldwide last year, and more than doubling the expected shipment of 30 million units in 2015.

As for content, it's been a slow progression with streaming services leading the way. In April 2014, Netflix was the first big provider to deliver 4K content to the home with *House of Cards* season two, and Amazon has stated it plans to shoot all of its 2014 original series in 4K.

Peanuts Worldwide, according to Towner, considers itself fortunate to be among the first to get in the 4K pipeline. It's in the midst of converting its entire ABC Peanuts catalog—more than 60 specials and some documentaries—into 4K with new partner Technicolor, a company at the forefront of 4K innovation, mastering and restoration.

Technicolor's M-GO video rental service with DreamWorks Animation recently launched a 4K streaming portal that debuted on Samsung Ultra HD TVs. The pay-as-you-go service now has content licensing deals with the likes of Sony Pictures, Warner Bros. and Disney.

Peanuts Worldwide found more reasons to believe in its 4K project from its recent consumer research with millennial moms. "We wanted to check in with consumers to see how they are feeling about 50-year-old programming," says Brodsky. "We tested in multiple markets in the US and found that co-viewing is strong with the brand—young moms consider the Christmas and Halloween specials, in particular, as family time."

A 2014 Peanuts study also revealed that the specials' ratings with kids six to 11 in the US were up approximately 150% versus the previous year. "It's clearly resonating with the next generation, which makes us feel good about investing in the restoration," she says.

The nuts and bolts of restoration

After Peanuts Worldwide decided to take the plunge and hand over its historic film to Technicolor, one of the first things that surprised the company's mastering and restoration account executive, Ron Smith, was the reaction of Technicolor's staff. "Our color technicians—grown men and women—were fighting over the right to work on it. It's wild because everyone seems to have this special relationship with the series. It goes to show how fondly it's remembered," says Smith.

According to Towner, it's estimated that the restoration of the entire catalog will take about two years. "We prioritized the first 20 specials to restore by determining the most popular ones. The first to air will be *A Charlie Brown Christmas* in December," she says. "We've also expedited the first 10 that will air on ABC in 2015."

Interestingly, because 4K hasn't become fully mainstream with consumers yet, ABC will be promoting the specials as "digitally remastered" this year. But according to Peanuts Worldwide, that messaging may change next year.

Back at Technicolor, Smith says a core group of five to six people are doing most of the restoration work, with about 20 people involved overall. He says the first step in launching a restoration project is research. "You want to know as much as you possibly can about every aspect of the IP and be true to the original," he says.

The next step was to create a plan with Peanuts Worldwide and collect materials. Smith says his team has been very lucky so far because it's received all of the original elements for each special. "It means we have the original film negatives and original 35mm magnetic film soundtracks to work with. A lot of restoration projects aren't that fortunate."



The long Long Holiday

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Smith was also amazed by how well the elements have been preserved. "They were in surprisingly good shape. I was really afraid of opening the soundtrack to *A Charlie Brown Christmas*, for example, because magnetic sound film usually deteriorates faster than pictures. But it played back, wasn't warped and didn't smell. We were very fortunate."

Smith and his team first check the negatives for splices and any obvious signs of wear-and-tear and then make repairs to ensure the film is ready for the 4K scanning process. "We put the film on the scanner and take a picture of each frame, which becomes a digital data file. While one camera takes a picture of the RGB image, a second camera simultaneously takes a picture of the dirt and defects on the negative. Then each picture needs to be color-corrected and cleaned," says Smith.

As many of the film negatives are quite old, Technicolor is using an archival scanner that handles film very gently—it doesn't have any teeth or sprockets to hold the holes in the film.

Unifying palettes

One of the more obvious challenges of restoring decades-old series is dealing with animation from different eras where many different groups of people are involved. "[Peanuts] tried to be consistent with color palettes, but every show is a little different. Even with the first special, we debated over what color Charlie Brown's sweater was," says Smith. "With HD and 4K, you can produce colors you haven't seen before. It's a completely different palette from when the series started being produced."

Fortunately, some of the people who worked on the original specials, including Lee Mendelson, an executive producer on all of them, lent a helping hand. "They were able to bring in cells of the original animation which showed us what it was supposed to look like," says Smith.

One of the not-so-obvious challenges of the project was coping with the inconsistencies in cataloging and naming that can occur with a long-running property that had changed hands.

"When you go to pull elements, or ship elements, you realize the importance of just being accurate like a librarian or a vault attendant," says Smith. "I counted, and among all the shows, 55 of them contain the words Charlie Brown and 14 start with 'It's.' A lot of people like to eliminate those things."


"Peanuts in 4K is gorgeous. When you see the beauty of taking things back to their original color, it's truly special."

— Kim Towner, Peanuts Worldwide

While the restoration has gone smoothly so far, Smith says that when you're dealing with original elements, certain problems can't be fixed, no matter how much you want to remedy them. "In *A Charlie Brown Christmas*, we did encounter an audio problem that I never noticed before. I had that immediate sense of panic, but we knew it couldn't be fixed. You just have to live with it."

Future-proofed

As Peanuts Worldwide ramps up for the 50th anniversary of the specials, Towner says the most welcome surprise for her is how much the restored versions have exceeded their expectations. "Peanuts in 4K is gorgeous, warm and textured. When you see the beauty of taking things back to their original color, it's truly special."

For viewers wondering how the specials will look on current HDTVs, Smith says they have a lot to look forward to. "Although no one really knows the true resolution of a film negative, 4K scanning and finishing comes closer to reproducing the original film element than ever before," he says. "As for picture quality, the more pixels in a digital image, the better the downstream visuals. So even on current high-definition televisions, the picture will be better than ever. The soundtracks have also been cleaned, restored and optimized for modern broadcast and home theater." 

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True to its ethos

The UK's most trusted kidnet CBeebies expands its multi-genre programming lineup with more dramas, docs and strong females

Live-action preschool drama *Topsy and Tim* was CBeebies' top-rated show of the year

The challenge Twelve years since launching as a commercial-free digital channel for kids under six, BBC's dedicated kidnet CBeebies continues to deliver on its commitment to offer a diverse portfolio of the best original and acquired programs for preschoolers and their caretakers.

Led by top-rated recent hits such as *Sarah and Duck*, *Katie Morag*, *Topsy and Tim* and *Peter Rabbit*, CBeebies now reaches more than 2.2 million children every week. It is also a hit on the BBC iPlayer—in 2013, there was a 60% increase in requests for CBeebies titles on the platform. Additionally, its first app, *Playtime*, has been downloaded nearly three million times.

More co-production growth and quality content is expected this year, thanks to television regulator Ofcom's decision in March to increase CBeebies' quota of acquired programs from 20% to 30%, leaving 70% of the sked designated for original programs. The adjustment allows CBeebies to air fewer repeats of older programs and frees up scheduling space for more of its most popular acquired shows—the majority of which are produced in the UK.

CBeebies viewers are also getting more female-led series, including live-action family drama *Katie Morag*, as well as *Mini-beast Adventure—With Jess* and the upcoming classical music-inspired *Melody*. "We've had a lot of flak over a perceived lack of female role models," says CBeebies controller Kay Benbow. "But we actually have a lot of strong female leads in our live-action shows and many more coming through in animation. That said, we still need more strong female leads. At pitch and proposal stage, the default position does tend to be male."

The programming In keeping with its recent strategy to bring more drama to the channel, CBeebies has been riding high from the response to its two new live-action book adaptations *Katie Morag* and *Topsy and Tim*. The former was recently re-commissioned, and the latter was the channel's most successful show of the year. "It was an ambition

of mine for a very long time to bring drama to the channel," says Benbow. "It gives kids at the top end of our audience, the four- to six-year-olds, a different style and genre. It takes them to another world, but still reflects the things that are familiar in a child's life."

Another departure for the channel is *Time For School*. "The first series rolled out early this year and shows real children starting school. It's our first real observational documentary," says Benbow. "It demystifies the school experience, not only for the children but for the parents, too." The program, which resumes this October with season two, focuses on all aspects of school life, including children falling out and not doing what they should be doing.

Make it an event CBeebies' recent dinosaur-themed week, executed in partnership with the BBC's Natural History Unit, featured popular new shows *Andy's Dinosaur Adventures* and *Dinopaws* and was a huge success. "We try to do things other channels wouldn't do," says Benbow, pointing to the channel's first-time involvement with BBC2's *Stargazing Live* event this year, which encourages people across the UK to get out under the stars and learn about astronomy. "We did five special programs and it was fantastic because BBC2 would remind people to tune in to CBeebies the next day," she says. The channel also just aired its first-ever *CBeebies Prom* featuring the BBC Philharmonic at Albert Hall.

Next up Looking ahead, Benbow says the channel is excited for the September premiere of *The Furchester Hotel*, its first-ever co-production with Sesame Workshop, and is looking for more drama, observational docs, game and quiz shows, and female role models. It also plans to make its CBeebies Radio content more accessible across platforms and to release more digital content. (Its second free app, *Storytime*, launched for iOS and Android devices last month.)—Jeremy Dickson

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JustLaunched



As Hulu's first original kids series,
Doozers has been a cross-
platform hit

Henson's Fraggle spinoff picks up steam

Now that the diminutive but determined green construction workers known as Doozers have moved into the spotlight with their own 52 x 11-minute CG-animated preschool show from The Jim Henson Company and Canadian co-producer DHX Media, it's all systems go. Since debuting on Nick Jr. Australia in October 2013, *Doozers* has launched in more than 50 territories worldwide, including the US, as Hulu's first original kids series. With big announcements coming on the L&M front, and new app releases on the horizon, expect to see a lot more of the hardhat-wearing workers.

Modern sensibilities *Doozers* follows the adventures of a group of four Doozer kids—Spike, Molly Bolt, Flex and Daisy Wheel—known as The Pod Squad. Set in the modern and eco-friendly world of Doozer Creek, the series encourages kids to create and innovate using a unique curriculum called STEAM (science, technology, engineering, art, math). “One of the reasons why there has been so much interest in the brand is its STEAM curriculum, which is currently something that parents, teachers and kids really want to be involved with,” says Richard Goldsmith, EVP of global distribution for The Jim Henson Company. “*Doozers* is about how families, kids and people in communities innovate, and how technology interacts with their world. It's been great to see such a positive response to the fact that it is a modern show for modern families.”

Goldsmith says this is the reason why Henson launched the show on Hulu first in the US, rather than taking the more traditional approach of a television premiere. “We wanted something different for the first wave of content in the US,” he notes.

Doozers made its debut on the streaming platform on April 25, 2014, which coincided with a day-and-date release of episodes on iTunes. “This is the first time that an



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Cyber Group Studios

A Magic World Of Entertainment

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SVOD company has allowed this to happen for an original series with iTunes. But we have a long history with both iTunes and Hulu, and Henson content seems to resonate well in the iTunes store,” says Goldsmith.

Henson’s launch strategy for Hulu saw seven episodes premiere on Hulu Plus, followed by a cycle of three more new eps every third Friday, for a total of 52 episodes to air through March 2015.

So far, according to Goldsmith, *Doozers* has been one of the most watched series on the platform. “They’ve done a terrific job promoting *Doozers* across Hulu, putting a lot of thought into how to curate the series,” he says.

Streaming support To highlight *Doozers*, Hulu launched a substantial marketing campaign that featured prominent on-channel and device brand placements, a direct email campaign to Hulu subscribers and cross-promotional partnerships (Funbrain, Common Sense Media, Nintendo, IDEO). The SVOD service also reached out to mom blogs and dad influencers, money got spent on digital ads on family-focused websites, and efforts were made across Facebook, Twitter, YouTube and Google+, along with an extensive PR campaign. “Even though we’ve been on for several months now, they continue to highlight the series,” adds Goldsmith.

Brand growth Having also debuted on networks including Discovery Kids (LATAM) and Turner channels Cartoonito (UK), Boomerang (Germany) and Boing! (Italy), *Doozers* is now set to launch on Turner’s Cartoonito across Southeast Asia later this year, and multiple broadcast deals are currently being closed in the Middle East. Goldsmith says more SVOD deals are in the works, two new apps will follow top-ranked iOS app *Doozer Creek*, and the IP’s consumer products program will kick off at BLE next month.

—Jeremy Dickson

Now Trending—Media

What’s bubbling up in kid content culture



Veteran animator James Lopez is tapping into STEM for his new film project being crowdsourced on Indiegogo

Steam punk gears up

Tapping into the rise in importance of science- and math-based kids content, the need for strong female characters, and a genre that encourages tech innovation, a group of prolific Disney animators led by veteran animator James Lopez (*The Lion King*, *The Princess and the Frog*, *Paperman*) have launched an Indiegogo crowdsource campaign for *Hullabaloo*, a family-friendly, 2D (hand-drawn) animated steampunk film. Creator Lopez is initiating the project as a short film first, with aspirations to expand the story as a web series, TV series or feature film. *Hullabaloo* follows the adventures of two brilliant young female scientists, Veronica Daring and Jules, who use their wits and science to combat a mysterious group of villains who have kidnapped Veronica’s eccentric father to exploit his secret inventions.

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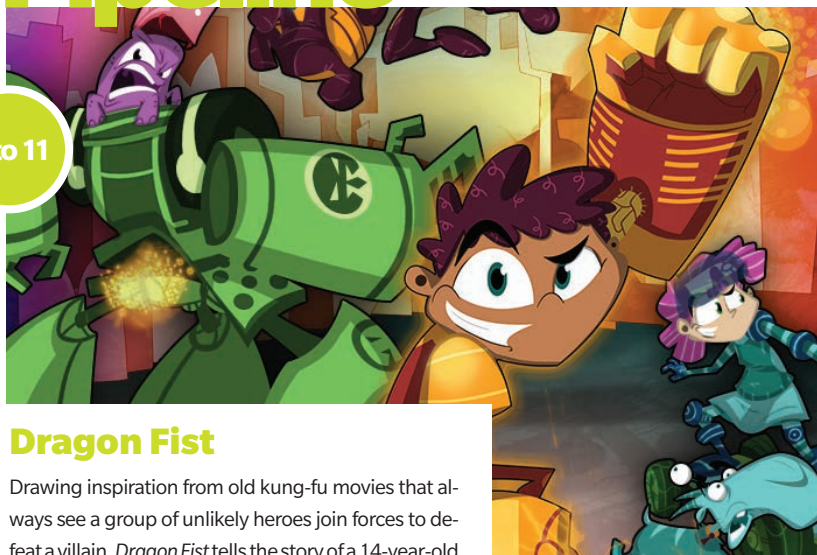
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9 to 11

Pipeline

An early peek at shows on the development track



Dragon Fist

Drawing inspiration from old kung-fu movies that always see a group of unlikely heroes join forces to defeat a villain, *Dragon Fist* tells the story of a 14-year-old boy named Jake. Faced with saving the world from a hedonistic alien race—and its bio-engineered, mind-controlling bubble gum—he first needs to master the power of a secret weapon known as the Dragon Fist. Treehouse producer Dale Robinson is overseeing production, with writing from Mike DeSeve, Joe Vitale and Dave Benjoya.

Co-Producers: Treehouse Republic (Ireland)

Style: 2D/3D digital animation

Format: 52 x 11 minutes

Budget: Approximately US\$117,000/per ep

Delivery: Late 2016

Status: A bible is complete, and two scripts, a trailer and a full pilot animatic will be ready for Cartoon Forum this month.

preschool



Rollie & Friends Created by Steve Hanton of Manchester, England-based prodco Studio Distract, with 1461 serving as an executive producer, this new adventure-comedy

Co-Producers: 1461 Productions (UK), Rollie and Friends Limited (UK)

Style: 3D CGI animation

Format: 52 x 11 minutes

Budget: Roughly US\$6.6 million

Delivery: Fall 2015

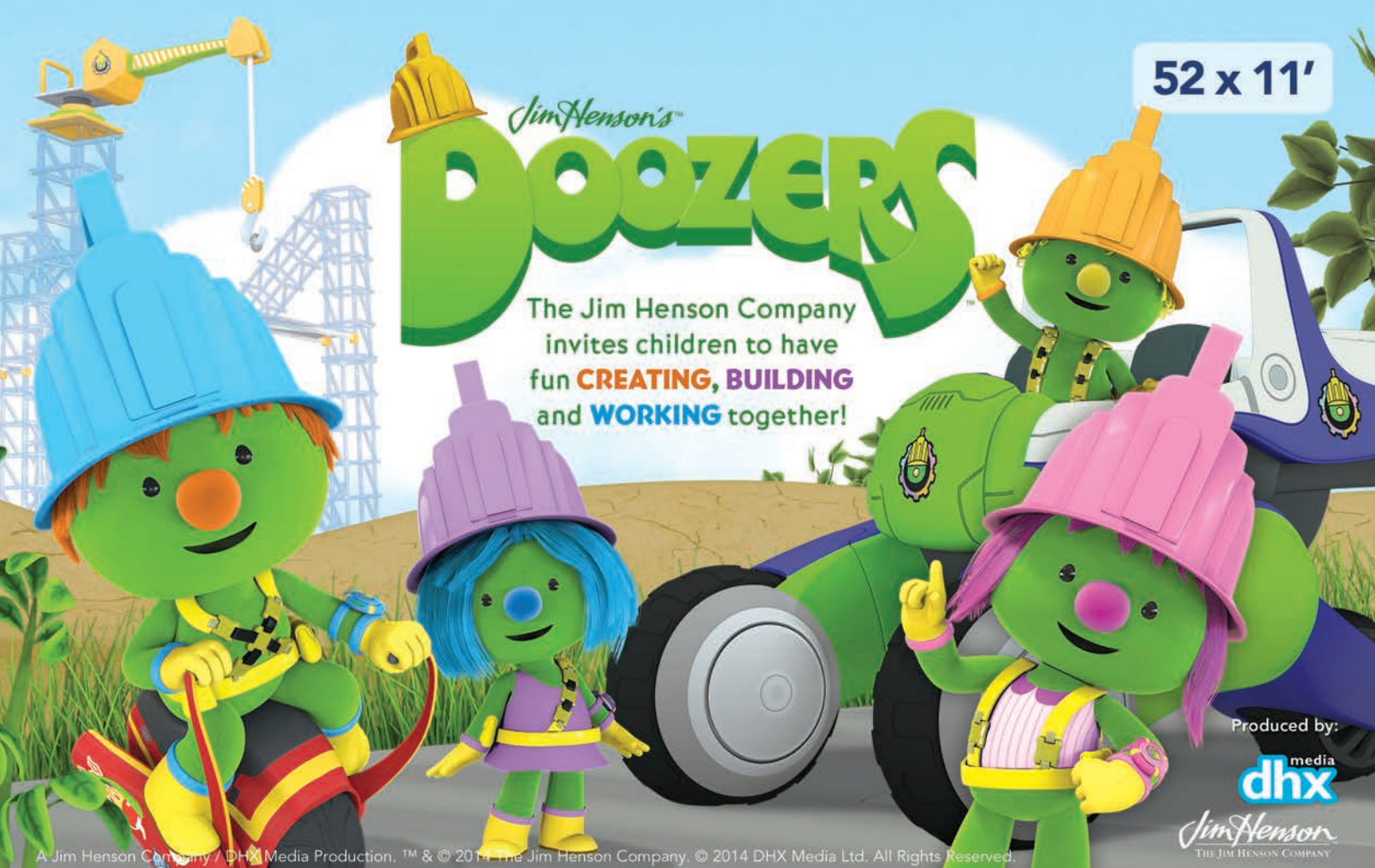
Status: In production with a new trailer, a fully developed bible and two completed scripts ready for MIPCOM. A full episode is expected for December 2014. Santa Barbara, California-based Foothill Entertainment has worldwide distribution rights.

series follows the action-packed life of Rollie, an enthusiastic roller coaster who longs to be the best ride at Sunshine Cove Amusement Park. Along for the adventures are his best friend Tootie, the Runaway Train, and a cast of colorful characters including Miss Sunshine the Ferris wheel, and the park's pirate ship Captain Splash. Each episode sees Rollie and Tootie overcome new challenges through problem-solving and learning through adversity. Diversity, friendship and teamwork are also among the show's key themes.

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Making machinima

How beActive is using real-time videogame engines to expand into original content

As today's on-the-move kids continue to demand more content on more platforms than ever, producers are looking for more efficient ways to deliver quality properties across them. Enter transmedia expert and Emmy-nominated writer/producer Nuno Bernardo.

As CEO and founder of European film, TV and digital production studio beActive, Bernardo and his team have found success in the live-action teen space with multiplatform hits *Sofia's Diary* and *Beat Girl*. Now the Lisbon, Portugal-based company is ramping up its animation pipeline, thanks to an innovative new platform it helped create called Machinima Storyteller. It helps content creators produce high-end 3D CGI animation through the practice of machinima—using videogame engines to generate animated sequences in real time.

The approach significantly reduces render times, eliminates re-rendering if changes are required, uses artificial intelligence to improve characters' range of emotions, and allows for the same 3D assets (characters, objects, backgrounds) to be used for game (mobile, console, web), TV series and film production via the Unity3D engine. And because beActive is using the process for original IP it is able to avoid legal issues that are often associated with the non-professional machinima approach where gaming fans create their own films from recordings of copyrighted videogames.

Bernardo's company developed Machinima Storyteller with German partner Zeitland in an effort to work around the high cost of traditional frame-based animation and a lack of funding in Portugal. "A couple of years ago we started making more apps that would expand the stories and characters of our web and TV series," says Bernardo. "But we realized it was a waste of time to do 3D modeling and character design for the game and then do it all over again for an animated TV series."

Through self-funding and eventual R&D support from Portugal and the European Media Pilot program, beActive is now moving forward with its own original animation. Its first project using Machinima Storyteller is *Collider 2017*, a spinoff tablet game and web series that are prequels to its sci-fi movie and multiplatform IP for young adults Collider. "We are also working to produce animated series for kids eight to 12 that we previously had in the pipeline, but were not able to produce," adds Bernardo.

beActive's next development project is *My Best Friend Is a Ghost*, a story about a nine-year-old boy who befriends a ghost while trying to fit in at a new school. Production is expected to start in early 2015.

Bernardo plans to develop more original kids IP while still exploring the possibilities of machinima. "The technology is very flexible. It can produce the look of 2D, 3D, hybrid animation and even cut-outs," he says. "We also want to bring the technology to the marketplace later this year and have more companies use it."

He notes that the production of a 90-minute feature film only takes three to five months to complete using Machinima Storyteller. "We can reduce the costs to about one fifth or one sixth of traditional CGI." —Jeremy Dickson

52 x 7'

EU Content



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Disney Infinity had temporary exclusives at virtually every major retailer—Target, Walmart, TRU included—and for a brief time, Wreck-it Ralph was only on shelves at Best Buy

Retailers are keen to grab product exclusives, but are they a manufacturer's friend or foe?

Exclusively everywhere

BY AARON HUTCHINS

Four years ago, Cheong Choon Ng invented a one-of-a-kind bracelet-making kit that could be found exclusively at his family home in Michigan. It was a labor of love—a way of bonding with his two young daughters—but the contraption proved to be such a hit with neighborhood kids that Ng decided to manufacture and sell it. He called it Rainbow Loom and it would one day change the toy landscape. But back in

2010, the biggest challenge was finding any retailer willing to carry it.

Ng tried to sell Rainbow Loom online, but potential customers didn't latch on to the concept, especially without any sense of how it worked. It was just a box filled with elastic bands, plastic clips, hooks and a plastic board. Big-box toy stores also balked at stocking a product with unproven sales. Mom-and-pop shops sold a few of the kits, but his big break came in 2012, when the owner of

Goosebumps

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one Learning Express Toys franchise ordered 24 kits. Two days later, Ng received another call for a reorder. Pretty soon, Learning Express Toys across the US were snatching up Rainbow Loom kits and offering “how-to” classes in-store.

As sales heated up into 2013, Ng got the call from US arts & crafts retail giant Michael's and he agreed to a one-year exclusive starting in August, with a few caveats. First, Ng wanted to continue to sell to smaller specialty retailers. Second, Michael's would not sell Rainbow Loom for less than US\$14.99 per unit—a lower price than that would undercut the indie shops that first supported Ng.

As it turned out, the trade-off was a trade up. Michael's has approximately 1,250 locations in the US, but a slew of smaller retailers carrying Rainbow Loom nation-

wide—with classes, events and clubs to boot—would help generate buzz. “Michael's sees these specialty stores as mini-salesmen for the product that will help it to continue the trend,” Ng says.

Approximately eight million original Rainbow Loom sets have now shipped worldwide, according to Ng, and the craft toy won top prize at the 2014 Toy of the Year Awards. Additionally, Rainbow Loom accounted for 2.9% of same-store sales growth at Michael's for the entirety of 2013, even though it only started stocking the kits that August. The arts & crafts store sold approximately US\$4 million worth of bracelet-making kits in those five months. The loom bracelet craze is now spreading across Europe, where even Prince William was recently spotted wearing one.

Ng says Michael's was a very good partner, though he would have tried to work out a different contract if he had a do-over. “Knowing what I know now, I probably would have made some slightly different deals that allowed me to be a little more flexible,” the 45-year-old says. “The deal with Michael's totally shut off the [chance] to be able to work with anybody else.” Namely, Rainbow Loom wasn't to be found at any of the approximately 7,500 retail locations combined for Toys ‘R’ Us, Walmart and Target across the US.

The sincerest form of flattery

“Ubiquity is the new exclusivity,” says Carol Spieckerman, president of the retail consultancy firm newmarketbuilders, based in Bentonville, Arkansas. “Being in more than one retailer makes it better for everyone because it drives awareness and it drives brand equity.”

So besides cutting off other avenues for sales, long-term exclusives can bring certain perils. “If an exclusive is granted to a single retailer, and you're well-known enough, and the concept is catching on, you do run the risk of limiting your options—and at the same time, having your brand diluted through knockoffs and copycats being sold at the retailers you didn't grant distribution to,” says Spieckerman.

There is no shortage of products trying to capitalize on the craze Rainbow Loom started, such as FunLoom, Bandaloom and Magic Loom. Toys ‘R’ Us listed the Cra-Z-Loom on its 2013 “Holiday Hot Toy List.” Ng even designed a competing loom machine of his own, Wonder Loom, to be manufactured in Rhode Island when Walmart asked for a Made in the USA version of the craft toy.

“Knowing what I know now, I probably would have made some slightly different deals that allowed me to be a little more flexible... The deal with Michael's totally shut off the [chance] to be able to work with anybody else.”

— Cheong Choon Ng,
Rainbow Loom



Fuhu's nabi tablet was once a TRU exclusive—the partnership lasted only a few months and later ended up in court

"If I'm Rainbow Loom, and I've got one or two SKUs, what's the advantage [of an exclusive]?" asks Richard Gottlieb, a New York-based toy industry consultant and publisher of online trade *Global Toys News*. "One chain can't give me enough distribution to make up for what I'm going to lose."

For retailers, however, there are few downsides to owning exclusive rights. It frees them from competing with others on price or selection. And when one major retailer has the hit toy of the season, like Michael's did with Rainbow Loom, running out of stock means customers might have to wait, instead of shopping at a direct competitor.

It's a fine balance, trying to maximize sales while keeping a product in high-demand. Without exclusives, a popular item sold everywhere might saturate the market, which could shorten its lifecycle and leave retailers with plenty of leftover stock. "Part of the excitement of a new product is being able to get it," Gottlieb adds. "Scarcity is a very exciting thing."

But sometimes an exclusive might hold a product back from its potential. In October 2011, California-based tech manufacturer Fuhu signed an agreement with Toys 'R' Us to become the exclusive provider of the nabi tablet to the retailer. That deal ended a few months later in turmoil. Fuhu claimed Toys 'R' Us failed to promote its tablet, or order enough stock during the holiday season.

When thinking about partnering with a retailer, Spieckerman says it's important to ask, "Is that environment a showcase for the brand or a rat race where you're competing with many other brands that are similar to yours?" Toys 'R' Us released its own competing tablet, Tabeo, in preparation for the 2012 holiday shopping season. Fuhu accused TRU of copying some of its tablet's design features.

The nabi isn't stocked at Toys 'R' Us anymore, but that doesn't mean its sales tanked. Quite the contrary. Fuhu sold 750,000 Nabi units in 2012. Last year, it sold more than two million of the US\$199 tablet, despite the prevalence of iPads. In back-to-back years, *Inc.* magazine ranked Fuhu at number-one on its annual list of America's fastest-growing companies, most recently with a three-year sales growth of 158,957%. This January, Fuhu announced a partnership with DreamWorks Animation to create the Dream Tab. The nabi is currently available for sale at Walmart, Target, Kmart, Costco and Sam's Club, as well as plenty of other online and physical retailers.

A trade-off with online exclusives

As kids turn to tablets with video on demand, online outlets also have an opportunity to combine shows and product sales. This June, Mattel-owned HIT Entertainment signed a deal to make *Fireman Sam* episodes and merchandise available exclusively to Amazon.com within the US. "This is an experiment, not just for Amazon and Mattel, but I think for the industry overall," Brian Solis, a digital analyst and business strategist with the



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Altimeter Group, told *Kidscreen* in June. *Fireman Sam*, while popular in the UK, does not have the same brand recognition in the US. The exclusive agreement means the series must start to gain traction without the help of kids who might only watch Netflix or Saturday morning cable TV.

In the world of e-tailing, however, exclusives can offer an avenue for IPs to stand out. Electronic Arts reportedly gave Apple a two-month exclusive on *Plants vs. Zombies 2* before the mobile game was later released on Google's Android. ZeptoLab's sequel to *Cut the Rope* reportedly had a three-month exclusive with Apple, in exchange for a prominent spot in the App Store. In a virtually bottomless pit of downloadable apps, simply being seen by customers is hard enough for a new game. Trading off promotion for temporary exclusivity can help get the ball rolling, without cutting the cord with other retail outlets entirely.

The big bang theory

Exclusivity isn't dead as a concept, Spieckerman says, but rather the duration of exclusives is shrinking with shorter, high-impact time frames—some even as quick as 24 hours—to create a “big bang” effect. “If those properties, characters, licenses have millions of followers and they are telling their fans ‘Go to Walmart tomorrow at midnight,’ they’re creating this incredible pressure cooker of demand that’s channeled completely into a single venue,” she says.



Disney Infinity, for example, used its vault of franchise characters to capitalize on small windows of exclusivity at retailers virtually everywhere. Want the special crystal figures? Try Toys ‘R’ Us. Looking for first dibs at Jack Skellington from *The Nightmare Before Christmas*? Go to Gamespot. More of a Rapunzel fan from *Tangled*? She was only at Walmart from Thanksgiving to early January. During that same time, Wreck-it-Ralph was only at Best Buy, while Vanellope Von Schweetz sold at Target.

“Retailers run pretty aggressive campaigns at driving consumers to pick up their favorite Disney Infinity characters when they have these exclusives in their store,” says John Vignocchi, executive producer at Disney Interactive Studios. Why limit a brand to one store, when it can be exclusive with everyone? **k**



Angry Birds Stella takes flight in 2014 with an app game, animated show and CP roll out

Flying the coop

Rovio adds some girl power to its CP lineup as Stella breaks out from the flock

She's still angry like the rest of the birds, but Stella should make Rovio licensees smile. The Finnish company's new app *Angry Birds Stella* launched on September 4, and to coincide with the mobile game's release, the company is lining up products ranging from stationery to toys.

Come November, Stella will also star in her own animated series on ToonsTV, Rovio's free multiplatform channel—available as an app, and through VOD providers and certain Smart TVs—that has surpassed three billion total views since it launched in March 2013. “We wanted to do something that’s 360 degrees rather than just launching a game or a product,” says Naz Cuevas, Rovio EVP of consumer products licensing. “This is something new for us.”

While Stella was introduced to the Angry Birds universe several years ago, her lead role will see her on a new island with a supporting cast of new female characters, including shy Willow, socially inept Dahlia and practical joker Poppy. The series will also feature a new baddy, Gale (aka Bad Princess)—the franchise's first villainous bird that just happens to command a group of minion-like pigs that are secretly in love with her.

And while Cuevas stresses the brand's inclusiveness for both male and female Angry Birds fans, the new characters

will open doors, especially in consumer products. “We really have the opportunity for the first time to tap into new product categories that are a bit more special for the female,” Cuevas says. Think cosmetics, jewelry, accessories or other trendy fashion items.

For starters, Rovio has partnered with US-based licensees Evy of California (fashion apparel), Accessory Innovations (backpack and lunch boxes), Jay Franco (bedding) and Commonwealth (plush). With a focus on mid-tier specialty and department store retailers, Stella-based goods will fly first to the US, UK, Mexico and China later this year. Back-to-school and home décor products are also ready for the game's launch. Likewise, Rovio sees Stella expanding to reach a broader fan base of tweens to young adults, with program drivers that include apparel, accessories and loungewear, health & beauty, stationery and Hasbro Telepods.

With a full worldwide rollout in the works, Rovio is also currently looking for partners to spread Stella's licensing wings in 2015 into areas like promotions, food, beverage and confectionery. “Yes, it might have Stella on the title. Yes, it might be the color pink,” Cuevas says, adding those characteristics don't mean the new brand will solely target girls. “It's more than meets the eye, man.” —Aaron Hutchins

BabyFirstTV steps into licensing

BabyFirst launched on Mother's Day in 2006 as a TV channel for babies, but it now has placement on VOD, in addition to games and apps with approximately five million downloads, not to mention a growing viewership across 33 countries. CEO Guy Oranim first noticed that fan engagement was on the rise when he began to see evidence of moms, who watch the channel with their infants and toddlers, making their own BabyFirst products (including fully themed first-birthday parties) and posting the results on social media. “We thought now we have the critical mass that makes merchandising a rational thing to do,” he says.

BabyFirst paired up with L.A.-based agency Brand Central this year to start a licensing program focused on educational products like developmental toys, along with BabyFirst-themed party supplies, plush, books and apparel. With those products now available on BabyFirst's website, the channel's first branded DVDs will hit US retailers this fall.

Initially focused on the North American market, where half of its viewership is located, the company is looking to expand the program with more apparel, accessories, feeding and toy deals to roll out for fall 2015. BabyFirst and Brand Central

are also seeking additional DVD, book and home decor licensees.

For a company that makes content for children under three, however, it can't bank on its audience to ask for a toy or book. Ultimately, for this demo, it's the parents who make the decision on what to buy. But that does create certain opportunity. A child under the age of three won't be left alone for safety reasons. Oranim says this gives BabyFirst a chance to connect directly with parents, which 85% of the time is likely to be mom, according to a 2013 survey of its viewers—the key decision-maker when it comes to family spending. —Aaron Hutchins

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Elmo and his extended British family open up hotel doors to new CP opportunities

Checking in

New Sesame/CBeebies co-pro *The Furchester Hotel* lines up the laughs, new products for UK preschoolers

Spending the night at the Furchester Hotel isn't exactly the same as staying at the more luxurious JW Marriott. For starters, room service isn't quite reliable. It may be Cookie Monster's dream job, but his employment as a waiter is not the most convenient for guests—unless they want their plates to arrive empty. Joining Cookie in the new preschool series are Elmo and the Furchester's proprietors—his aunt Funella Furchester; his Scottish uncle, Furgus Fuzz; and his seven-year-old cousin Phoebe.

Such is the setup for *Sesame Street*'s first-ever British spin-off series *The Furchester Hotel*, which comes across as a preschool version of classic sitcom *Fawlty Towers*—only featuring Muppets. And licensor Sesame Workshop is betting that the new series, with prime placement on top preschool pubcaster CBeebies, will add significantly to the company's UK licensing presence. A full program is currently in the works.

With Hasbro signed on as global master toy licensee, the initial program-driving toy line will have a soft launch in the UK in spring 2015. A second wave of Furchester Hotel products, including apparel, accessories, stationery and bedding, will be released throughout the summer and fall of 2015.

While Big Bird and the cast of *Sesame Street* expand into China and Japan with new VOD and licensing deals, Elmo and his fuzzy relatives have a chance to carve out a new fan base in Britain. Sesame Workshop and its UK licensing agent CPLG are still seeking licensees across all categories, including publishing, home video and digital media.

"There are new characters and new play patterns, given the hotel narrative," says Terry Fitzpatrick, chief content & distribution officer for Sesame Workshop. "We think it's going to be a deep and rich extension of the base Sesame Street product business."

The episodes revolve around creative problem-solving, such as what to do when the wolves staying at the Furchester howl at the moon while other guests are trying to get some needed shut-eye. "The hotel has an assortment of guests that range from animals, minerals and vegetables to the occasional human, and Elmo really is the eyes and ears of a preschooler in this wonderful new environment," Fitzpatrick adds.

Co-produced by Sesame Workshop and CBeebies, the first of 52 x 11-minute eps aimed at three to sixes will debut this fall. More broadcast partners for the BBC in-house production will be announced at MIP Junior next month. While Sesame Workshop is currently focused on the show's UK launch, there are plans for an international rollout of *The Furchester Hotel* sometime in the near future. —Aaron Hutchins

Making rock stars out of IPs

Who Fifty years ago, John Hornby Skewes started a small musical instrument agency and wholesale business out of his home in Garforth, England. With the help of his wife, the business took off and he needed more room for storage, seeking it out wherever he could: the old cinema, a parking garage, the old police station, and even a few Methodist chapels. Today, John Hornby Skewes & Company is the UK's largest family-owned independent musical merchandise distributor with a warehouse built on a four-acre site near Leeds.

At 80 years old, Skewes still comes to the office, and the company he founded exports to approximately 80 countries. Its products range from Fret-King electric guitars to Odyssey brass and woodwind instruments, and even Antoni violins. "We go right across the board, excluding keyboards," says JHS's publisher Simon Turnbull.

What In late 2007, JHS & Co. partnered in its first kids licensing deal with Nickelodeon UK to create SpongeBob SquarePants-branded ukuleles and guitars. Pretty soon, the partnership expanded to include drums, guitar straps, amplifiers, guitar picks, drumsticks and even electric guitars. When the company went to MusikMesse, Frankfurt's annual music fair, it discovered kids weren't the only ones drawn to the new look. "We had a two-metre wall of SpongeBob out," Turnbull says. "All the Germans would stop, take the camera phones out and take selfies with them." Since then, the company has picked up the license for British classic *The Beano* from DC Thomson, with junior guitars retailing for US\$79.99 and a three-piece junior drum set selling for US\$249.99. But the bestseller among licensed instruments for kids, according to



JHS helps turn kids into guitar heroes

Turnbull, is the ukulele. "Anyone can literally pick up a ukulele and learn to play a few songs very easily," he says.

Latest Innovation Innovation in the music industry comes primarily from those who test new sounds and styles with the instruments. "What we're concerned about is the quality and playability of the instrument," Turnbull says. The goal is also getting younger generations to pick up an instrument and learn a few songs. "The iconic characters go a long way in getting kids interested to play music," he adds. And for its third foray into kids licensed properties, JHS turned to Nickelodeon again. It is

launching a line of Teenage Mutant Ninja Turtles ukuleles and three-quarter-sized guitars this fall.

What's Next JHS is looking to revamp its range of SpongeBob products, but is also open to new licensed properties with a strong established fan base. "We're not in the fashion line where you can change the designs every three months," Turnbull says. "We're looking for longevity." Just like a rock band.

Contact Paul Smith, director of purchasing & logistics (44-113-2865-381, pauls@jhs.co.uk)
—Aaron Hutchins




BookBet Lost Stories from the legendary Dr. Seuss

Horton and the Kwuggerbug and More Lost Stories unveils four Dr. Seuss tales unseen for nearly 60 years. Originally published in separate issues of *Redbook* magazine throughout the 1950s, Random House Children's Books is bringing them together in one book (SRP US\$15) with an enhanced color palette for a US rollout to bookstores on September 9. Known for his outrageous characters and rhymes, Theodor Seuss Geisel passed away in 1991 at the age of 87 with 43 titles published during his career, including *Green Eggs and Ham* and *The Cat in the Hat*. In the latest lost stories, Horton returns to many a fan's delight, but so too does the Grinch without Christmas in sight. —Aaron Hutchins



Facebook remains the top social media platform of choice for teens, with 61% personally using the platform, and of that, 64% report using Facebook every day. As for Instagram, it's on a steady rise in popularity among teens, and more and more seem to be walking away from Facebook and moving to Instagram's more anonymous, "more personal" photo- and video-sharing service. Teens like Instagram's extra level of anonymity where an account is linked to a controlled username as opposed to a real name. While only 35% of all teens personally use Instagram, the level of engagement on Instagram is higher than on Facebook, with three-quarters of teens (of the 35%) using Instagram every day. From a gender perspective, teen girls tend to be trendsetters in the social space. As a result, we see that girls are likely to have more friends/followers than boys, as well as follow and/or friend more people than boys do.

So who exactly do teens include in their social network of friends? On Facebook, friends consist of peers from school, camp, sports and family. As Facebook usage has expanded across generations, teens have also found that posts or pictures shared with their friends were also being shared and seen with their parents and grandparents. What Instagram offers that Facebook doesn't is a different level of privacy. Teens report that their network of followers on Instagram consists of mainly friends from school, friends of friends, and often-times is a parent-free zone. As a result, what teens post and what they say over Instagram is becoming increasingly important. When asked if teens would rather have real-life friends see their Facebook updates or Instagram updates, 58% said that they'd prefer friends seeing their Instagram updates (versus 42% who would rather have friends see their Facebook updates). And for pictures, it's important that teens feel they're seen and heard when they post something in their social world. As a result, 61% of teens report that they'd rather have a friend/follower comment on a picture over "liking" a picture. The validation of a friend/follower "liking" or commenting on a picture further plays into the core themes of self-expression and self-discovery that are so important for teens today. 

This concludes part one of our report on social media. Next month, Kaleidoscope will dive deeper into teens' attitudes and behavior in the world of social media.

For more information, contact Kaleidoscope@nick.com

(Source: Device Tracking: Ownership and Use with Kids and Families; Wave 5: Spring 2014. Nickelodeon Kaleidoscope: The Friendship Files, August 2014) A major focus of the Consumer Insights Department at Nickelodeon is to live and breathe kid culture. We continually track and identify trends, and explore what it means to be a kid and teen today. In an effort to keep you in touch with our audience and give a voice to our consumer, we've created the Nickelodeon Kaleidoscope. Every month, Kaleidoscope will capture key areas of interest across the kid and family cultural landscape, provide an understanding of attitudes and behaviors, and report on trends and buzz.

Social evolution

Nick revisits how teens are using social media in their daily lives

BY ERIN MILLER

In 2009, Nickelodeon embarked on a study to understand the role of social media in teens' lives. As new platforms have emerged and behaviors have evolved, we thought it was due time to explore this complex, increasingly changing topic again. In part one of this Kaleidoscope report, we explore how 13- to 17-year-olds, are using social media in their daily lives, and their platform preferences for communicating and sharing with their network of friends and followers.

Teens have a great reliance on the "social" in social media. Socializing on platforms like Facebook and Instagram helps teens explore and express themselves—key factors to development at this age as they're actively working out who they are, and what their place in the world is. They thrive off building and maintaining relationships over social media, making this one of the main drivers for teens to use social platforms. Communicating with friends and family through social media only enhances these important connections in their lives.



A new class is in session

Back-to-school trends to put on your radar

BY WYNNE TYREE

Welcome to Heads Up! This new feature is designed to keep industry pros abreast of kid trends and will appear in each issue of Kidscreen. For our first installment, we'll be looking at US kids' annual mass-migration to the classroom. While marketers wind down their back-to-school activities, kids across America are just getting in the full swing of the 2014-15 school year. From San Diego to Portland, kids have traded in their swimming pools for backpacks, and their tablets for...well, tablets with homework apps. Here are a few noteworthy trends and hot topics you need to know about as you develop for the pre-K to middle school set.

Divisive to the Core

The new Common Core standards are rocking the US public school system and creating yet one more national divide—this time between educators, parents and administrators, and even politicians and businesses. In short, the standards were created to ensure that all public school students nationwide (kindergarten through grade 12) adhere to the same academic standards in mathematics and English language arts/literacy. While in theory this sounds like a great direction for the education of America's youth, in reality it has resulted in parental outrage over “dumbed-down” curricula, teacher panic over their inability to get their students up to standard, administrator backlash over the guidelines, and politicians rallying against the smell of “big government”. Kids will be left in the cross-hairs this year—unsure of what they'll be tested on, if their state will continue to use Common Core, and most importantly, if they'll be promoted to the next grade.

Next-gen school supplies

Remember the excitement of shopping for a fresh new box of Crayola crayons? Well, school supply shopping is not what it used to be—it's not about kids picking out items emblazoned with their favorite IPs. Instead, school supplies are all about meeting classroom and school needs. This school year, teacher-issued supply lists are full of requests for products like Purell hand sanitizer, Clorox wipes and Ziploc bags. And yes, pencils and folders are still on these lists, but parents know they can't buy their daughter Hello Kitty versions of them. The odds are that she won't “get them back” once the communal supplies are re-distributed, including to those

who can't afford to buy their own. Parents are essentially being asked to subsidize school funding shortages and help take the financial burden off teachers, who have historically purchased classroom supplies with their own money. The result? Expect to see fewer licensed and more gender-neutral school supplies, along with parents making bulk purchases that can benefit the entire classroom.

Lockers get personal

With much personalization missing from their traditional school supplies, kids are finding other ways to express themselves. Among the middle school set (grades 6 to 8), it's all about locker bling this year. Gone are the days of plain old gray lockers with just a shelf to organize books and maybe an extra hook to hang your jacket. Tweens are treating their lockers like mini-lounges and decking them out with shag rugs, magnetic picture frames, makeup brush holders, curtains, adhesive wallpaper and even motion-sensor chandeliers that light up when the door opens! While more common among girls, boys are no exception to the trend. Their DIY solutions include mirrors, sport-themed stickers and camouflage wallpaper.

Going app to school

Kids may be back in school, but they haven't put down their mobile and tech devices. In fact, kids are evermore dependent on technology to complete their school work. Tests are being taken on computers and tablets, and kids are keeping track of and completing homework with the help of various apps. For example, *MyHomework* helps students stay on top of their assignments, while other apps such as *Brainscape Smart Flashcards* and *Flashcard+* help them study. Students are also creatively using technology that isn't intended to be educational. Why bother cracking open a history book or hitting the library when Siri can tell you what year Christopher Columbus crossed the ocean blue? **k**



Wynne Tyree is the president of Smarty Pants, a youth and family market research and consulting firm. The Heads Up! section is derived from the company's daily in-person and digital immersion into kids' and families' lives, as well as proprietary quantitative research. For more information on how Smarty Pants can help grow your business, contact Meredith Franck at 914-939-1897 or visit www.asksmartypants.com.



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Kidscreen is gearing up to celebrate the market's best digital media products and platforms for kids with the third-annual iKids Awards.

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Stocking up

Disney Publishing corrals its tales into the **Disney Story Central** app, building its library and sales in one play

BY DANIELA FISHER

If anyone can attest to the power of a good story, it's Disney. Having produced iconic filmed entertainment for close to 100 years, the House of Mouse is also one of the most prolific publishers in the kids space—its publishing arm sells more than 700 million units of product worldwide each year, including eBooks, apps, magazines and digital comics.

This summer, Disney Publishing Worldwide, which falls under the company's Consumer Products division, penned a new chapter in its eBook business. It brought to life *Disney Story Central*, a brand-new app that lets kids read their favorite Disney stories as eBooks in personalized digital libraries. The app is free to download, with in-app purchases available only to adults.

Story Central is a sizable literary undertaking for Disney. It's the largest collection of Disney's digital books to be housed on one app. And it's also a sign of the times. According to a 2014 Cooney Center study, 62% of kids ages two to 10 in the US have an eReader or a tablet device at

home. As more kids take up reading on these devices, there are more opportunities—and demand—for companies to roll out titles in the kids eBook space.

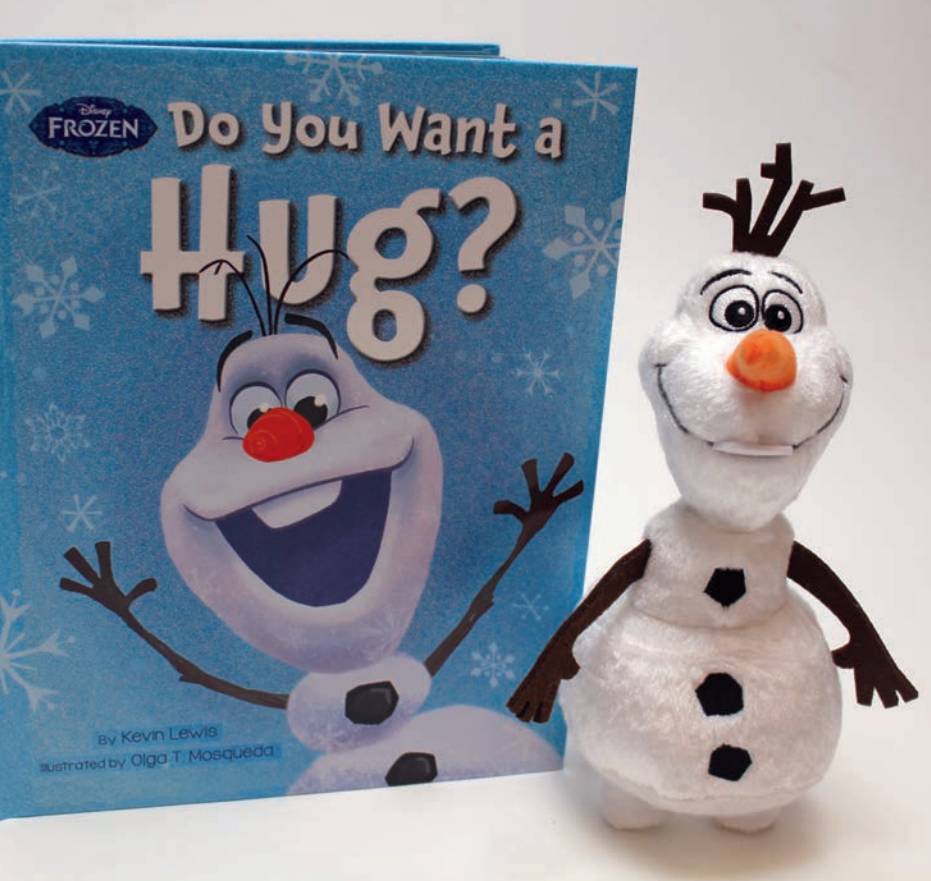
Statistics like this are not lost on Disney. Ramping up its ePublishing presence, the company launched *Story Central* via an iPad app and a tablet-optimized website. It's a move that puts Disney Publishing more in line with consumer desires.

From tome to tablet

In step with today's generation of digital-first kids, Disney Publishing released *Story Central* via an iPad app and a tablet-optimized website. It's a move that puts Disney Publishing more in line with consumer desires.

In the US, ownership of tablets in families with kids ages two to 12 has increased from 50% to 59% in 2014, according to an NPD Group study. And more than half of the families reported that their kids were using the devices more often.

Lyle Underkoffler, VP of digital media at Disney Consumer Products, explains why the tablet was the perfect platform to launch the digital library app. "We're seeing the tablet as a shared family device," he notes. "In some of the research we've done, with a smartphone it's really hard to



Disney plans to bundle more physical and digital products like this Olaf plush, print and eBook package

have a shared experience just because of the proportions of the screen. It's hard for a child and a parent to see the screen together, whereas on a larger screen you can achieve that."

What it's about

Geared to kids ages three to six, the app is the latest in digital storytelling. It includes customizable bookshelves for each family member. Kids can adorn their digital shelves with their preferred Disney character or property. They can also browse the library by favorite character, not just title. The idea is to get readers, especially reluctant ones, engaged.

"So if you're Sally and you're four years old and reading a Frozen story, or if you're Johnny and six years old and reading a Frozen story, that same story can be personalized to you in new and interesting ways," says Underkoffler.

Story Central also provides personalized reading recommendations, based on reading level instead of genre. So if a child reads a *Cars* book, the next recommendation won't necessarily be another Lightning McQueen title—it will be a book that matches the previous title's skill level.

Furthermore, the app is tied into a reward system that lets young bookworms earn stars and trophies as motivation to keep reading. To buy new titles, parents purchase tokens that their kids then use to buy the books. One Disney token costs US\$3.99 and purchases one book.

"We really think there's magic in the idea of having parents be the gateway to purchase and kids having some agency to what they want to consume and how they want to consume it," says Underkoffler.

Turning the physical-digital page

While Disney is crafting a new digital chapter, that's not to say it's left the world of print behind. If anything, eBooks are

another format for getting kids to read across all media. A 2013 study from New York-based research firm Play Collective and Digital Book World looked at children's eReading habits. In the study, 48% of parents say their kids have asked for physical versions of an eBook they own, and more than half of kids (54%) have asked for the eBook version of a favoured print book.

Cognizant of this increased preference for both media, Disney's CP division is continually on the hunt for different ways to connect the digital experience with the physical, not unlike the way Disney Interactive has seen such significant success with its hybrid digital/physical game system Infinity.

"We have a strategic initiative in consumer products around bundling physical and digital," explains Underkoffler. "So the idea is that a reading experience doesn't have to end at the last page of a physical book, it can also be extended into the digital space. We're launching a number of what we're calling 'bundled experiences' in this same time frame."

The soon-to-be-released *Frozen Hide-and-Hug Olaf: A Fun Family Experience* is a good example. A printed book, toy and digital book bundle, it lets kids take Olaf on a hide-and-seek adventure similar to *Elf on a Shelf*. The Olaf package, set to hit stores at the end of October with an SRP of US\$26.99, comes with a plush of the lovable snowman. The bundle lets DCP sell across platforms with one particular product, like an eBook, augmenting or extending the experience of another. In other words, this kind of packaging ensures digital or mobile doesn't cannibalize physical product sales.


What's good for Disney...

On the digital side, the rise in tablet ownership and eReading is good news for the kids eBook business. More tablets in the hands of the digital-first generation could see a boost in eBook sales. Already, the price of children's eBooks is on the rise.

According to the Play Collective/Digital Book World study, parents are increasingly seeing the value of digital content, and subsequently are willing to pay more for digital books. They were most comfortable with eBooks priced between US\$3.50 and US\$9.00 apiece, paying US\$7.00 on average for a children's eBook, a figure that's gradually risen over the past year.

As eReading popularity continues to climb among kids and parents, Disney is positioning *Story Central* to lead the pack. Going forward, Disney Publishing will continue to add new stories to the library on a monthly basis. The publishing giant will also look to bring *Story Central* to even smaller screens and other platforms.

Ultimately, while the app comes with all the bells and whistles of a digital property, like customizable bookshelves and read-along guides, Underkoffler believes it's the power of a good story that keeps tech-savvy kids interested.

"Digital is just a new medium for great stories," says Underkoffler. "I think that's really important, not getting lost in the gadgetry of technology and remaining focused on great storytelling." 



New Kid in Town

C is for Coding

Educational app
ScratchJr teaches 5 to 7s
the basics of coding

Starting from Scratch One of the latest education-centric apps to hit the App Store is *ScratchJr*, based on the widely successful computer programming language Scratch, which was invented by MIT Media Lab's Lifelong Kindergarten group.

While Scratch is used by older kids and adults, the new *ScratchJr* iPad app is designed to teach five to sevens how to code. It launched via Kickstarter this past spring, meeting its US\$25,000 funding goal within two days and eventually attracting US\$77,474 in donations by the campaign's end.

A new literacy *ScratchJr* was created through the collaboration of the Developmental Technologies research group at Tufts University, MIT Media Lab's Lifelong Kindergarten Group and the Playful Invention Company (PICO).

With the app, kids snap together programming blocks to make on-screen characters do things like sing, dance or dribble a basketball, essentially using computer programming to tell a story, which reinforces the idea that coding is a new type of literacy.

Project coordinator for *ScratchJr* at Tufts University, Amanda Strawhacker, shares her insight on the growing interest surrounding under-eights learning programming skills: "All of our research is rooted in the idea that these skills are accessible to young kids. We just have to change the tools," she says. "It's not that they can't do it—it's that we're not making it easy or [simplifying it a lot] for them."

The organizations worked closely with a number of designers and user-experience experts to create a digital environment that appealed to kids under eight, creating attention-getting graphics, characters and sounds. "We combined that [technical expertise] with our knowledge of how children react to tangible, digital experiences, what they look for—what they want to experience when they're creating something or sharing something with a friend," explains Strawhacker. "So we spent hours making sure that everything clicks and has a satisfying tap sound, all the characters are fun and engaging, and that everything is intuitive."

As kids code with *ScratchJr*, they develop problem-solving and design skills, and it supports the development of early literacy and math skills. It also helps kids think creatively and preps them for the life they'll spend adapting to ever-changing technologies. And in terms of where *ScratchJr* falls in the educational app space, it's offering a more interactive approach than the competition. "A lot of the apps for children's early programming that I have seen work on technical proficiency," says Strawhacker. "It's almost like they're doing flash cards for programming. But with *ScratchJr*, we really make it an open platform. We want it to feel more like kids are telling a story than practicing their multiplication tables."

Upcoming The iPad app is currently available for download on The App Store. The makers of *ScratchJr* are looking to release an Android version later this year and a web-based platform by 2015. They're also looking to create new sharing features and resources for parents and teachers.

—Daniela Fisher

The Digits

Numbers that speak volumes about kids and technology

According to a recent study, apparently kids who play video games up to

60 minutes

a day are happier, more sociable and less hyperactive

(Oxford University)



When parents are researching toy purchases,

62%

rely on **product reviews** on the retailer's website

(The NPD Group)

Six- and seven-year-olds in the US **prefer tablets**

for gaming, with 83% saying they like playing on tablets "really a lot" or "really, really a lot"

(Viacom's The State of Kids and Gaming)

Gen Z (1995 to 2012), is pretty cost-conscious, with


57%

saying they'd rather save their money than spend it

(Cassandra Report, The Intelligence Group)



Photo: StockMonkeys.com



PBS KIDS' latest app
Super Vision gives parents
real-time connectivity
with the multiple screens
their kids are using

A new kind of play

Synchronous and social are the key rules when it comes to the next wave of second-screen viewing

BY BRENDAN CHRISTIE

Not all that long ago, “second screening” typically meant users were having an asynchronous experience—moving between two or more screens that were working independently and not necessarily all that connected.

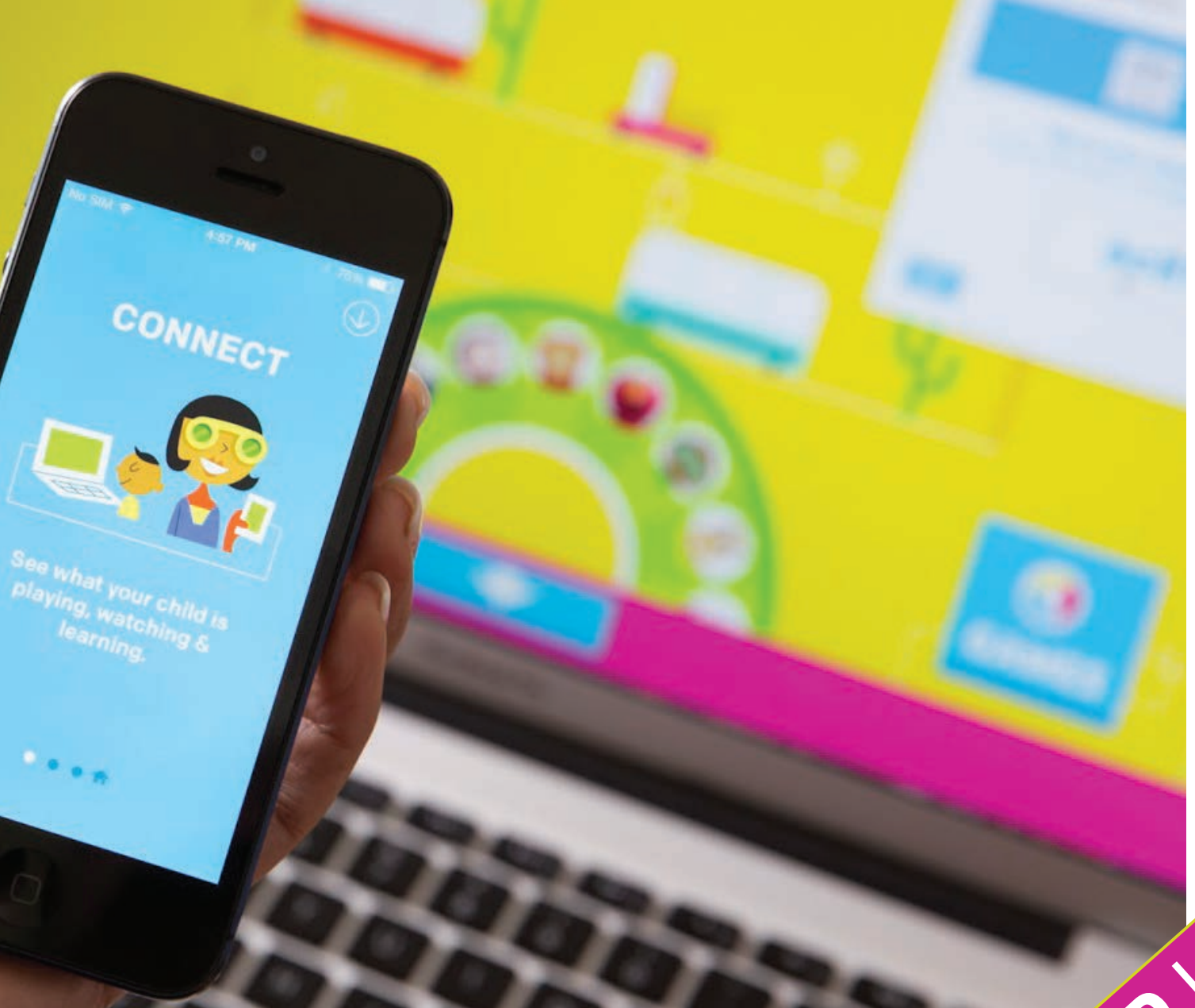
But just two years in from the first wave of second-screen hype in the kids TV business, that’s not the way things are anymore, says VP of PBS KIDS Digital, Sara DeWitt. In fact, one of the US broadcaster’s latest offerings, *Super Vision*, is an app that gives parents a real-time glimpse into their child’s activity on its website pbskids.org, from what they’re watching and playing, to what skills they are developing. It monitors screen time and even offers follow-up activity suggestions for parents. Most notably, it takes advantage of advances in HTML 5 programming and a technology called WebSocket to offer true real-time connectivity between multiple screens.

“It really evolved from a number of conversations we were having with parents about how kids use content,

and the value that parents place on the content,” observes DeWitt. While PBS has always ranked high in parental trust, parents didn’t always realize what kids were gleaned from their screen time. *Super Vision* displays how children are developing in areas such as literacy, science and other categories.

The new app evolved naturally from an earlier effort called *PBS Play and Learn*, which launched about 18 months ago and gave parents tips for “teachable moments”—ways they could easily integrate learning into their day in fun and effective ways. It was downloaded more than a million times, which DeWitt notes was a clear indication that they were headed in the right direction.

“What we also learned from *Play and Learn* was that parents were relying on their own devices,” she says. “They weren’t necessarily sitting down at the computer with their kids while they were playing. These were really things they wanted to get on the fly and on their own feed, for lack of a better term.”



MIP Jr.

So when it came to *Super Vision*, it was about allowing parents to seamlessly sync to their child's screen, having the app deliver the educational messaging, and then offering up suggestions for where to go next.

But that's just the first step into true second-screen integration. In June, PBS announced that the *PBS KIDS Video* app would be compatible with Google Chromecast—the thumb-sized media streaming device that plugs into the HDMI port on a TV and can receive content from a smartphone, tablet or laptop. It means PBS viewers have immediate and free access to thousands of videos, including clips and full episodes from PBS KIDS series.

And that translates to more real-time opportunities for PBS to interact with viewers and parents. “I think we’d like to explore what happens to the device that sends the content to the television,” says DeWitt. “Is the parent still holding it? If so, then it’s another opportunity for us to tell you what’s going on and what the child is learning.

Or as the child gets older, it’s an opportunity for them to play a game while they’re watching the video.”

PBS isn’t the only broadcaster innovating with synchronous second screen. In the UK, the BBC and SyncScreen.tv have joined forces with producers on two projects to experiment with a robust audio watermarking process that offers viable second-screen interaction, regardless of whether or not the signal is live or recorded.

Game on...many screens

SyncScreen.tv recently worked with the TV teams at Lion Television and Citrus TV on an effort for its *Gory Games* quiz show (an off-shoot of the ever-popular *Horrible Histories* series), giving viewers a chance to play along with what was happening on air.

Unlike most second-screen services that rely on an in-studio team to “push” the interactive elements live on the director’s cue, the *Gory Games* application is powered by an audio-recognition system that ensures the games will

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From asynchronous action to hard fun

4+

Focus Integration

The easiest form of second screening, Focus Integration happens when TV and smaller screens are fully in tune. Kids might be asked to play a game while they take a break from watching a video, for example.

6+

Synchronized Engagement

During Synchronized Engagement, a child is participating in two or more related activities, such as watching TV and tweeting about the experience with their friends. Or they might be looking up information about a topic they have come across about a show on Google or Wikipedia.

7+

Split Attention

For Split Attention activities, children are able to participate in two or more activities that have no relation to each other, such as watching TV and playing *Minecraft*. It's the hardest type of second screening because it requires kids to be able to divide their concentration between two or more sources of input.

Age matters when it comes to second-screen behavior

The definitions to the left, provided by London-based research firm The Pineapple Lounge, are supported by experiences at PBS. "We saw that if you tried to have kids play and watch at the same time," notes PBS KIDS Digital VP, Sara DeWitt, "it was just overwhelming to a younger child. For those younger ages, we are talking about asynchronous second screen and really are thinking more about parents and children together. As kids get older, that's where multi-focus gets a lot more popular."

So a PBS kid might graduate from *Daniel Tiger's Neighborhood* or *Super Why!*, where the app puts them through the same kind of routine the TV show might, to something more complicated such as math-based *Cyberchase*, where they watch the video and try to mimic it in real time.

"Older kids can handle much more complex levels of game play—really complex levels of thinking where they are both engaging in an interactive experience and a linear experience," says DeWitt.

She notes that older users also have the longest engagement, tend to have the deepest game play, and can handle more complex structures.

"That's where you get into the theory of hard fun," she notes. "Kids at that age are constantly trying to push the limits of their own mastery. They don't give up unless it's impossible. They want it to be really hard, so we see older kids spending a lot of time with apps—sometimes longer than the length of a show."—Brendan Christie

be perfectly synchronized. Marc Goodchild, co-founder of SyncScreen.tv, explains that "most systems don't take into account the broadcast latency you get around the country, which can leave you up to 14 seconds out of sync." With the audio cues, the system can work with live TV, PVR, VOD or any other means of transmission.

The *Gory Games* app was downloaded more than 100,000 times in its first three weeks on the market and topped the children's charts in the UK Apple App Store for free games aimed at nine to 11s. More importantly, perhaps, it also regularly broke the 15% home play-along mark, clearly demonstrating that kids have a strong desire to get interactive in a synchronous way. Goodchild also notes that the second-screen play on *Gory Games* even drove on-demand viewing of the series on the BBC iPlayer.

Goodchild points out that the system is an excellent way to easily breathe life into old formats and catalogs, or just add fresh elements to series that are in their third or fourth cycle. "We're not banging on about it being emergent

technology," he observes. "The technology is here and it's robust. It's more about unlocking the potential of new shows or finding ways to revive formats."

There can be a bit of a learning curve for producers, he says, but the technology is getting easier and cheaper to utilize all the time. Even in the few months since the company worked on *Gory Games*, he notes, the cost has dropped significantly and the process can now be done as part of the edit. For an average 26-ep series, Goodchild says these apps cost roughly US\$125,000. But as the tech improves, he expects costs to drop significantly.

Second screen increasingly means social

So how do kids feel about synchronous second-screen experiences? Emma Worrollo, MD at London-based research company Pineapple Lounge, has dedicated plenty of resources to studying kids as they multi-task across screens. Her first revelation—they don't really notice that they're doing it.

MIP Jr.



"As an industry, we kind of think about second screening as this magical moment when a really interesting thing happens and a child kind of chooses to have a second-screen moment," says Worrollo. "It's not like that. We're now at the point where it is completely spontaneous. It's innate to them."

That realization is definitely borne out by real-life experience. "A couple of parents I was talking to the other day were describing how their kids watch television with their friends in separate homes together using Facetime," says Pat Ellingson, creative head of children's programming for Canadian pubcaster TVO Kids. "Imagine: I'm on my tablet, talking to my buddies through Facetime, watching a television show, and tweeting about what we're watching. These eight- or nine-year-olds have three screens going all at the same time."

Worrollo makes the observation that play has always been a non-linear thing, and that what the industry is experiencing now is just the technology catching up with

Paper Idols

True audience interactivity comes when kids feel heard, says hit maker Ylva Hällen

Targeted at three- to 10-year-olds, *Minimello* was the brainchild of writer/producer Ylva Hällen. Originally a presenter on Swedish pubcaster SVT's kids block Bolibompa, and faced with six minutes of screen time to fill each day, she had a brainstorm. "Swedes are mad about the Eurovision song contest and *Idol* and all of those types of shows. So I thought I would do a show like that," she says.

Hällen had noticed her own kids making dolls with toilet paper rolls and suggested her audience do the same. The toilet paper roll puppets then became singers, giving voice to songs Hällen wrote about topics close to kids' hearts. Kids could vote for their favorites online and the winners would progress. "In the first week, it went completely mad. They understood it from the first second."

In fact, over five seasons, 25,000 dolls have been submitted. In 2013 alone, six million votes were cast over the seven-week season—that's in a nation of just nine million people. It also attracted the participation of plenty of Swedish stars who wanted to voice the toilet paper roll characters, something kids would never notice but parents would.

"You have to get kids involved and engaged," Hällen observes. "It has to be something that they have to do and they feel important. It's not just clicking and then it doesn't matter what happens. It does matter. There's a winner and you can watch the numbers go up while you are voting, so they get involved with the artists and songs."

Hällen says the website for *Minimello* is simple and image-led, so that even a three-year-old can find their way around. And maybe simple is the key to its success. "*Minimello* is about making dolls," she says. "It's so analog. It's old-fashioned. I love the mix of the old-fashioned and really modern thinking."

But Hällen has had even greater success domestically with a series called *Superlördag* (*Super Saturday*). A mystery series that launched last spring, Hällen says she roughed out a story arc, but only wrote one episode at a time—filming the show on

Wednesdays for a Saturday broadcast. That gave her viewers a chance to weigh in on the direction of the story and offer their ideas and input.

The show is driven by a poem Hällen wrote—14 lines in 14 different languages that must be translated in order for the mystery to be solved, the seven stolen talismans recovered and Super Saturday saved. At a point in each show, Hällen stops time and a single line of the poem becomes visible for the kids to translate.

Says Hällen, "I wanted to reach out to all of the kids we know are watching our shows, including foreign children living in Sweden. I wanted them to feel that this was about them, too."

She says the response to the translations was so high—especially from kids who were not ethnically Swedish—that she thought she'd try an experiment. In one of the later shows, after letting kids know the only way she could be saved was to click on a green button on the website, she froze time and stood still (in real time) on live TV.

"We didn't stop the camera for 30 seconds," she says. "And during that time, we wanted them to press that green button. We didn't know if they were going to do it, but in that time we had about 100,000 votes." Put in context of the US population, that would be almost 3.5 million clicks in 30 seconds. And Hällen points out, they averaged about 200,000 viewers that evening.

"We know that kids are going to vote over the weekend," she says. "We know that they can vote early evening. But those were [real-time] votes."

Why does Hällen get such a high second-screen response from viewers? She says it's because they know their interaction makes a difference, whether it's submitting story/character idea or votes or pressing a green button. "We do things like this back and forth," she says. "I think they have gotten used to it with me, and they know that if they send something in, it is going to be part of something real." —Brendan Christie

Innovations from the classroom?

In Canada, provincial pubcaster TVO Kids first got into second-screen experiences meaningfully via some successful experiments with voting several years ago. One especially notable effort was a co-production aimed at six- to nine-year-olds called *Pillars of Freedom* (with Toronto-based Smiley Guy Studios), which aimed to teach kids about democracy—an important part of school curriculum, but maybe not the best fodder for TV viewing. The show created multiple endings that kids could vote for on online, and the winner was broadcast linearly. In the end, more than 100,000 votes were cast for the first season.

"We were really blown away," says Pat Ellingson, creative head of children's programming at TVO Kids. "I think a lot of the success had to do with not only how the content was designed and presented, but also because we connected with kids on multiple platforms. At the time, there was not anything out there like it. It was the first time we really started to look at what integrating the two screens could look like."

But second screen means something different for TVO, which has a strong educational mandate. "It's going to be

interesting to see where a lot of the innovation comes from," says Ellingson. "As we visit classrooms—which we do on a constant basis—I am astounded by how kids and teachers are connecting with screens in a way that entertainment professionals haven't even done yet," she remarks.

"A lot of school classrooms have interactive white boards and they're using those white boards as tools rather than projection screens, which is not what they were designed for," says Ellingson, citing one example. "We're all going to have to really keep our eye on a lot of what is bubbling up from the classroom" -Brendan Christie



MIP Jr.

kids' basic preferences. Young viewers can now curate their own entertainment and media play experiences, and because of that, it has started to mirror traditional play.

But a lot of true second screening is being led by social media usage. Pineapple observed that when kids eight to 12 were given the opportunity, they tended to create their own digital ecosystems in which real-time social played an important role. For example, they might be on Skype, watching Netflix, and playing *Minecraft* at the same time.

"I think the social media side of it, particularly for girls, is really important," she says. "I think that until there is a platform designed and built for kids that is able to serve up the social experience as well as the adult platforms do, it's going to be hard because one of the drivers for second screening is adding social elements to the TV experience."

Social doesn't necessarily mean kids want to play along with their friends. It might mean sharing scores or just the ability to talk with their pals about what's happening on screen—and kids will still use the linear TV experience for quiet time by themselves. But the more gaming and play become part of their media experience, the more real-time social interaction kids will come to expect.

"We all talk about the small [tablet or phone] screen being the second screen," observes Worrollo. "I think we need to shift our mindset because that's no longer the case—TV might be the second screen now."

She adds that this shift doesn't mean TV is any less important, or any less a part of the experience. "For kids, TV is kind of the host of the party," Worrollo contends. "And the small screen is where the action happens. It's the person in the middle of the party dancing and having the most fun. That's where their attention is, and I think as an industry we probably need to accept and embrace that, and not be afraid of it."

Perhaps the most important thing to take away from these observations, however, is that the industry needs to be listening to the end users—the kids talking advantage of the technology to create these new ecosystems.

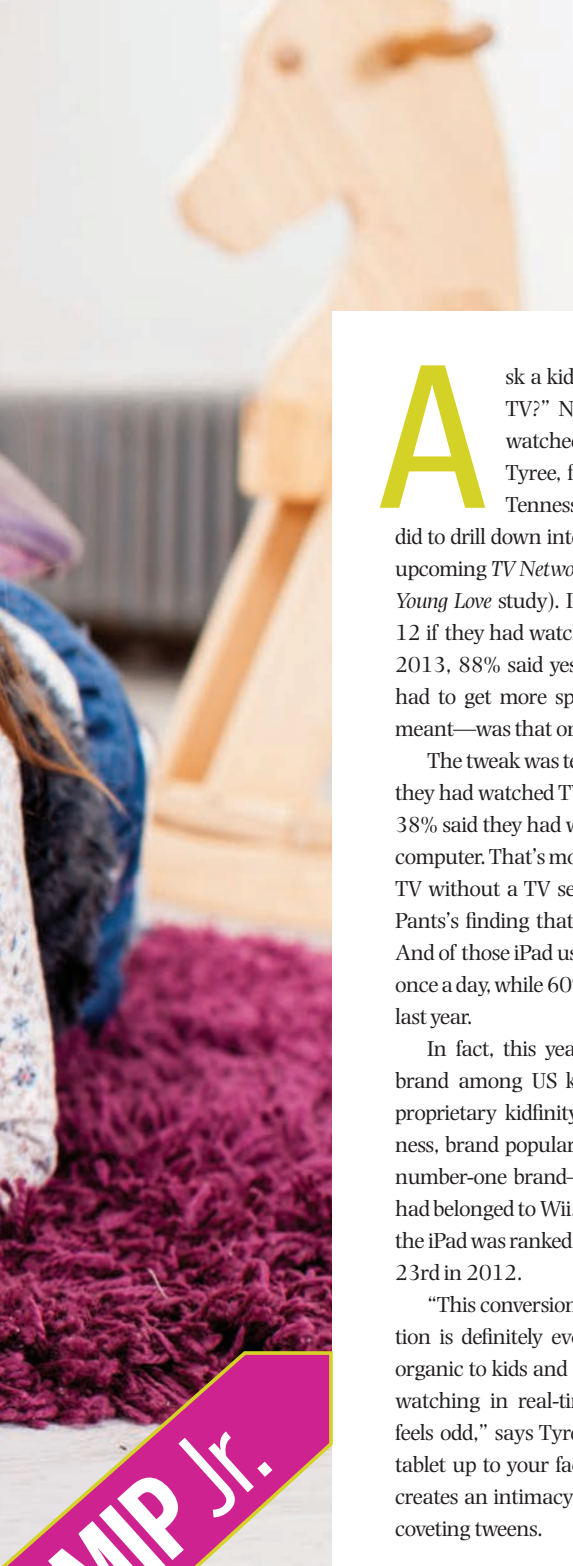
"This is a collaborative generation," observes Worrollo. "In fact, we call them 'Generation Collaboration.' I sometimes think we make assumptions, we worry about things and create issues. I think we need to get better at talking to kids, collaborating with them and working closer with them in order to predict the future and start future-proofing and planning. I feel like we're constantly catching up with them. Working with children has never been more important." K



Keeping Watch

While SVOD players rack up original kids content, and broadcasters and prodcos alike navigate a shifting model, we've gathered kid experts on both sides of the pond to share their first-hand experience studying kids media habits and their effect on OTT services and linear kidnets.

BY ELIZABETH GRANT



Ask a kid, “When was the last time you watched TV?” Now ask, “When was the last time you watched TV on a TV?” That’s just what Wynne Tyree, founder and president of Jonesborough, Tennessee-based research firm Smarty Pants, did to drill down into research on kids’ viewing habits for its upcoming *TV Network Report* (part of Smarty Pants’s annual *Young Love* study). In past years, Tyree asked US kids six to 12 if they had watched TV at least once in the last week. In 2013, 88% said yes. In 2014, however, Tyree realized she had to get more specific in defining what “watching TV” meant—was that on a TV set or another device?

The tweak was telling. A full 73% of kid respondents said they had watched TV on a TV set within the week. However, 38% said they had watched TV on a tablet, mobile device or computer. That’s more than a third of kids who had watched TV without a TV set—a figure that coincides with Smarty Pants’s finding that 64% of all kids said they use an iPad. And of those iPad users, 80% said they use their iPad at least once a day, while 60% do so several times a day—up 4% from last year.

In fact, this year the iPad ranked as the number-one brand among US kids ages six to 12 on Smarty Pants’s proprietary kidfinity scale, which measures brand awareness, brand popularity and kids’ love for brands. That’s the number-one brand—not device. In past years the top spot had belonged to Wii, McDonald’s or Oreo. And only last year, the iPad was ranked eighth among kids, having shot up from 23rd in 2012.

“This conversion to tablet viewing and mobile consumption is definitely evolving every single day. It feels like it’s organic to kids and is being driven by them. The concept of watching in real-time and waiting through commercials feels odd,” says Tyree. She adds that the freedom to hold a tablet up to your face changes the viewing experience and creates an intimacy that resonates, especially with privacy-coveting tweens.

Control freaks

“Six- and seven-year-olds are control freaks,” says Maurice Wheeler, a partner at London-based The Little Big Partnership, a youth- and family-oriented marketing consulting firm. The company studies different age subsets to see how a particular technology will influence a certain age range. For sixes and sevens, the world has become a bit scary and there are consequences to their actions, says Wheeler. “They desire to create a world they can control, so for example, they might start collecting things like cards. On-demand plays quite nicely into the hands of these young control freaks, who can plan and orchestrate their activities.”

Controlling what they watch allows them to consume as much content as they can around a favorite brand. “We call it bingeing, but it’s just consuming content that they love,” says Wheeler. “And SVOD is great for bingeing.” Think *Harry Potter* or *The Hunger Games*—content that compels kids to consume everything around those brands both off-line and online.

That bingeing, popularized by Netflix in the grown-up TV universe, has filtered down to kids who have the opportunity to watch as many library episodes as their hearts desire. And it can also work in the favor of linear networks, says Smarty Pants’s Tyree.

“There are ways in which networks can leverage these types of platforms and have a play in this type of viewing. Whether they want to lock it down within their own systems or they want to work with SVOD players,” she says. Using their distribution networks to grow the brand overall can bridge the gap, Tyree contends. (After all, *SpongeBob* isn’t just a TV show.) That viewing, whether it happens through an SVOD platform or via linear TV, allows a kid to engage with a brand on any device, as long as the brand resonates and translates into revenue from consumer products and other extensions.

Opportunity lies in the distribution of content, says Tyree—it’s possible to create lifestyle brands by using various platforms to surround those who love your brand with it. She says the incremental additive time to surround your target market with your brand creates infinite possibilities. “The challenge is monetization,” says Tyree. “How you get the residual income breaks up the paradigm that used to exist in terms of distribution.”

B2B: brand to brand

“The beauty of linear TV is that you have a certain audience at a certain time, and you have the opportunity to cross-promote,” says Tyree. She adds that one of the challenges of SVOD is awareness in general, which traditional networks like Nick, Disney and Sprout already have and can use for the cross-promotion of their own programming. “We give kids more credit for sharing things than we should. With some of the newer content being developed, if it’s not supported by some of the big industry players, how do kids even find out about it?”

SVOD services like Netflix and Amazon know the value of trusted brands. It’s no secret that the platforms have drawn in viewers through deals with existing networks and distributors for well-known library content and are banking on leveraging it to engage kids with original content.

Most of Netflix’s new kids originals have centred around exclusive extensions of well-known TV and

Now streaming

While a slew of research in the last year points to kids and families embracing on-demand and device-friendly viewing delivered up by OTT providers, research firm **Smarty Pants**'s numbers really hit home. Its findings show that specific streaming services are edging up slowly but surely each year.

NETFLIX

For Netflix:

- Awareness among kids six to 12 rose from 84% in 2013 to 87% this year.
- In 2013, 62% of aware kids said they used the service. Now 72% do—an increase of 10%.
- Frequency of usage is up, too. In 2013, 59% of users watched Netflix at least once a day, which is now up to 68%.

hulu

For Hulu:

- Awareness of the brand among kids six to 12 rose from 50% to 55% over the last year.
- Love for the brand remained flat at 15%.
- Among kid users, frequency of usage is up—from 44% at least once a day to 58% in 2014.

amazon instant video

Amazon Instant Video was included for the first time this year and the data showed:

- In 2014, awareness among kids six to 12 in the US is at 53%.
- Of those who are familiar with it, 57% of kids say they use it.
- Another 13% say they want to use it.

YouTube

And for YouTube:

- Awareness among American kids six to 12 rose from 90% to 93% between 2013 and 2014.
- But those who are using it are doing so more frequently—43% used to visit YouTube several times a day, now 49% do.

From Smarty Pants's upcoming TV Network Report, where 6,661 US kids six to 12 were surveyed. It will be published in October.

feature film brands—such as series stemming from its 300-hour content deal with DreamWorks Animation. This year, the pair is bowing *Puss in Boots* (a spin-off of the Shrek franchise), *King Julien* (a series based on Madagascar's manic lemur), and a *Veggie Tales* reboot. And last year, the SVOD service also debuted *Turbo: Fast*, a TV series based on the feature film that grossed more than US\$280 million in theaters worldwide before the series started streaming.

For its part, Amazon recently launched *Annedroids*, an original CGI/live-action series that it hopes will help differentiate its service from the SVOD pack. The series will also air in Canada, Germany, Norway, Sweden, Brazil and Asia on linear channels. The show is one of three original kids series, along with *Tumble Leaf* and *Creative Galaxy*, that the platform has debuted in the last year.

Planning ahead

While SVOD services are pumping up their original content offerings, independent content providers are jumping at the chance to distribute their brands through these powerful networks and partner to create original programming.

L.A.-based MarVista is one of many industry players setting up proactive in-house digital divisions. MarVista Digital Entertainment licenses the company's original and acquired content to digital platforms across cable, satellite and telco, as well as broadband and consoles throughout North America.

"We're looking to acquire or produce programming specifically for the digital division, and we're also experimenting with movies that we can debut on digital platforms day-and-date with their US theatrical release," says Vanessa Shapiro, EVP of distribution at MarVista.

Besides investing in software to streamline digital delivery of content across platforms, the division will offer curated monthly program slates—with a steady output of at least two newly released titles, and a minimum of three catalog titles—of independent and family, teen and tween content. "The main difference in today's landscape is to window the title properly," she says.

The division launched this summer with the release of the tween comedy *Zapped*, which made its world debut on Disney Channel on June 27, followed by its June 28 digital rollout on on iTunes. At press time, it was the highest-rated iTunes movie for the division. Shapiro says the company has its eye on catering to the tendency of SVOD services to program more genre-driven or cast-driven content. In particular, she's banking on upcoming holiday releases *12 Dog Days of Christmas* and *My Dad is Scrooge*, which will have digital releases alongside their traditional TV broadcasts.

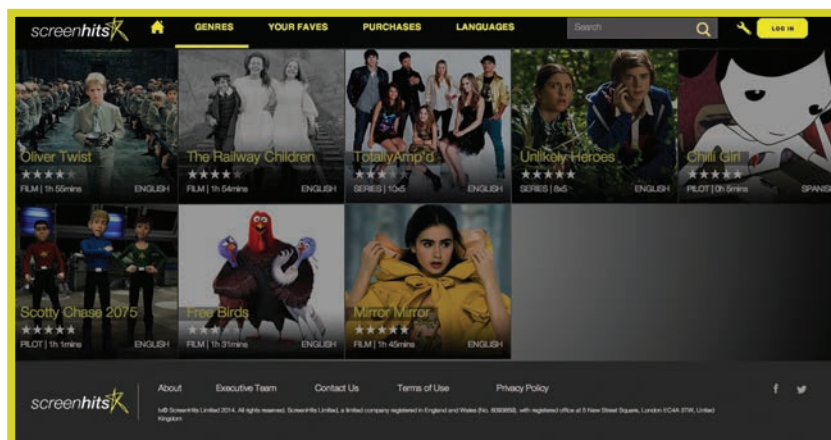
The YouTube connection

While streaming SVOD services are benefitting from the increasing attention of viewers, producers and distributors in the kids space, the industry is waiting to see what's in store when YouTube finally unveils its long-rumored plan for the under-13 crowd.

"YouTube is a universal connector," says Wheeler. "All kids have access to YouTube, whereas some kids might not have access to Netflix if theirs is an Amazon Prime house. Or their house might just be on catch-up. So the default for many kids is, 'Have you seen that video on YouTube?'"

In fact, Smarty Pants's hot-off-the-press research shows that 93% of kids in the US now have awareness of YouTube, and almost half of them visit it several times a day.

"It's probably the number-one competitor to both traditional TV and SVOD services like Netflix," says Tyree.



ScreenHits

Upstart SVOD service offers new opps for second windows

While SVOD services like Amazon, Netflix and Hulu have paved the way for consumers to act as industry influencers, relative newcomer, ScreenHits is creating a bridge between the on-demand and linear worlds by extending its B2B service to consumers. The service launched in 2012 as an online TV industry platform for buying and selling content worldwide.

"The overall message is, watch it here first and have a chance to say what gets made and played on television," says Rose Adkins, CEO of the London-based company.

Originally designed as a cost-effective marketplace that enabled broadcasters to acquire programming from a select group of distributors, the B2B site tests programming—including unsold pilots—with consumers in different territories. The feedback is used to help promote and sell content to broadcasters and cable operators in those territories.

ScreenHits saw an opportunity when consumers began inquiring where they could find a show or film in their own country. It then went back to its content partners and asked if it could sell the programming directly through the platform.

"We believe that online can work with traditional broadcasters and cable companies by timing the content delivery process and working together to build audiences," says Adkins. "Whether it's something we deliver on a second window, we believe that the future of TV is about working together to make sure that the consumer can watch TV wherever they want to."

Adkins says offering second windows of earlier seasons can help bring in new consumers and then drive them back to the broadcaster to watch new seasons of the same series. "There's so much you can do to work with each other," she says.

The consumer site has about 150 selected hit international TV shows and films, updated every quarter with content from

producers and distributors including Fox International Channels, Hasbro, Shaftesbury, DHX Media, Al Jazeera, Turner Broadcasting, Studio Hamburg, eOne, Lionsgate and Telemundo. Additionally, there will be 50 new pilots available to watch every six months, 30% of which will be kids content. Users can view the programming for free with ads or watch ad-free for a fee.

Marrying the consumer-driven experience with the marketplace, ScreenHits' advertising partners have the opportunity to finance additional episodes of series. And ScreenHits also has its sights set on eventually funding pilots itself to provide exclusive original content on the platform.

Adkins says the platform differentiates itself in the kids space by integrating children's content into the homepage rather than featuring it on a separate tab, which she says allows the content to come up more in searches for family fare based on overall genres.

"We wanted to make sure for our content partners that we're not hiding their content in genres in a category that they can't find," adds Adkins.


Launching in four key markets—L.A., New York, London and Mexico—Adkins plans to roll the consumer site out worldwide and will program territory by territory, focusing on a selection of international and local hit content. It will also provide content genres that it knows work well in certain regions, such as Bollywood titles in Saudi Arabia or telenovelas in Russia.

"Some companies want to have worldwide internet dominance. It's not going to happen. There will always be other content partners," says Adkins. "The cable companies and broadcasters will always have their space carved out, and so online it's about being able to work with them and being able to share windows." -Elizabeth Grant

"Nowadays moms are getting behind it and using it like their kids do—for watching how-to videos, getting ideas and general fun watching. The stuff that you see on YouTube—maybe a silly cat video or a clip from an animated cartoon that somebody has created themselves—is fresh and unique for moms and kids, making it a much more palatable entertainment experience for the entire family."

YouTube made headlines this summer when reports surfaced that owner Google was planning to create a kid-friendly version of the video site, allowing online accounts for kids under 13 and giving their parents control over how the service is used, feeding off statistics that showed parents were already creating accounts for their kids.

Though Google reps weren't ready to confirm, reports have claimed the kid-friendly version of YouTube would allow parents to control what information Google collects, and that it would be designed for tablets, on which adults would be able to monitor what their kids are watching.

"It will be an interesting move to see how Netflix and Amazon do or don't use YouTube. And more importantly what YouTube does next," says Wheeler. "If YouTube creates an environment in which it becomes safer and friendlier for kids, I think that will change the whole marketplace again. If YouTube is a place parents are happy to send their kids to, it could even make SVOD services irrelevant." 

MIP Jr.

Unlike the 1980s-focused retro revival of the early 2000s, this time around there's a kid-friendly franchise reboot in the works from pretty much every decade since the dawn of modern pop culture. With their eyes on an increasingly crowded licensing landscape, how are property owners updating their old favorites for this generation of kids while retaining their classic appeal?

Revival

BRAND LICENSING



British classic
Thunderbirds are go
—for a reboot



Resurgence

BY AARON HUTCHINS

When *Thunderbirds are Go* first appeared on the BBC back in 1965, mankind had yet to land on the moon. *Star Trek* hadn't boldly gone where no man had gone before. Walt Disney, the man behind the world's most famous mouse, was still alive.

It's been almost 50 years since Gerry and Sylvia Anderson debuted their sci-fi TV series set in the year 2065 that followed the adventures of five brothers living on a secret island. Each brother was assigned a rescue machine—be it for land, sea, air or space—known as the Thunderbirds. The show opted not to use live actors, but instead featured a cast of marionettes.

Next year, the brothers will return for a reboot of the classic series under ITV Studios and Pukeko Pictures. The backgrounds and buildings are miniature models, while the water surrounding Tracy Island is real. And like the original, the new iteration will be non-violent in nature and take place in the year 2065. Not all aspects of the classic, however, will remain the same.

"We always knew we would have to dispense with the marionettes because they weren't going to fly in 2015," says Giles Ridge, executive producer of the new *Thunderbirds are Go!*

Thunderbirds is hardly the only franchise with an upcoming revival. Companies are breathing new life into classic characters from every decade since the '60s for today's generation of kids.

In the UK alone, there's 1970s stop-motion *Morph* from Aardman Animations, most recently revived with a new series of shorts funded through Kickstarter, while 1980s hit *Danger Mouse* is getting a second life thanks to FremantleMedia Kids & Family Entertainment and CBBC. The pair were encouraged by a 2013 airing of the original *Danger Mouse* series that drew 569,000 viewers for UK diginet C&TV, and a new 52 x 11-minute series is set to air next year. Even relatively newer properties that debuted in the 1990s—*Powerpuff Girls* and *Teletubbies*—are being prepped for a comeback.

These shows may have an existing base of older fans, but when joining with a full slate of reboots from competing entertainment companies, nostalgia alone won't cut it. Storylines and products need updating for today's kids, without drifting too far from what made the franchise so beloved the first time around. That means even Ms. Frizzle, the energetic teacher from Scholastic's *Magic School Bus* that was last produced as a TV series in 1997, must prepare some fresh lesson plans.



Fall Toy Preview 2013 Attendees
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\$15.5B represented from 19 of the top 25 toy sellers (US sales), NPD

From iPhones to iPatches

Magic School Bus debuted to US audiences on US pubcaster PBS in 1994. When *Magic School Bus 360* launches in 2016 with 26 new episodes, it will be on Netflix—so it's safe to say times have changed. To bring the storytelling up-to-date, not only will the bus need some technological upgrades, but the character Carlos might also don a smart suit that can record his body temperature or movements. After all, many kids could very well own some wearable tech by then. "When we told the original [*Magic School Bus*] stories, YouTube didn't exist. Google Glass didn't exist," says Leslye Schaefer, Scholastic Media SVP of marketing and consumer products. "Technology wasn't front-and-center when we did the original series."

Danger Mouse was once the super spy of British kids cartoons, but like any secret agent, he still needs state-of-the-art gadgets to thwart his foes. "Just as James Bond has evolved, I think Danger Mouse will evolve," says Rick Glankler, Fremantle's EVP and GM of Kids & Family Entertainment. For starters, Danger Mouse's old eye patch will be replaced with an iPatch, which offers new opportunities for storytelling and consumer products.

But while technology can be at the forefront of plot lines, it's important to stay ahead of the curve so that series resonate with kids for many years to come. In 2006, for example, Netflix was still a DVD-by-mail company that had yet to start streaming video; Blackberry was approaching its peak, while MySpace was the most visited website in the US—ahead of Google. Eight years is an eternity for technology. Will kids in eight years know about the iPad or iPod?

"When we do the new [*Magic School Bus*] series, as much as we want to include cutting-edge concepts, we don't want it to outdate itself within two years," Schaefer says. That means also staying at the front line of technology for consumer products. "We hope to see more of an emphasis on digital products in terms of licensed goods," she adds, be it games, apps or even camera technology. "Hopefully there will be a line of licensed wearable technology."

And a franchise revival, with its built-in brand awareness and marketing, can generate a lot of interest from risk-averse licensees and retailers. A brand's survival and future growth depends on re-interpreting it as opposed to protecting it. "We're not trying to curate something like a museum," says Tim Collins, head of brands at UK-based DC Thomson Consumer Products. "We're trying to nurture things and grow them to appeal to different people from different places."

Don't mess with success

While storylines and products are retooled for today's generation of kids, it's important not to lose sight of what made the original property popular to begin with. Ten years ago, Jason Tammemägi was tasked with directing *Roobarb and Custard Too*, a comeback for the beloved British animated dog Roobarb, who first appeared on the BBC in the '70s. Instead of drastically changing the IP, the team decided to keep many of the same characteristics that made Roobarb so beloved decades before. "What we were all worried about was



The *Magic School Bus* flies from US pubcaster PBS in 1994 to Netflix for 2016

that the first thought of parents would be, 'What on earth have they done to my beloved childhood memory?'" says Tammemägi, now creative director of Dublin-based children's media company Mooshku. "And then you're starting from a very negative place."

Just look at what happened to Paddington Bear. As images of the upcoming movie started to appear on the web, there was noticeably little talk about the star-studded cast that includes Nicole Kidman. Instead, the focus became Paddington's new CGI look that many found disconcerting. Pretty soon, there were memes featuring the friendly bear photoshopped into terrifying scenes from classic horror movies like *The Shining* and *Silence of the Lambs*. "Creepy Paddington Bear" even has his own Tumblr account.

"I hear the term risk-averse about [revivals] a lot, but they do come with risk," says Tammemägi. "You don't have to live up to the original—you have to live up to everyone's rose-tinted memories of the original."

On the other hand, Paddington's new look might be what it takes to resonate with the new target audience, even if some computer-savvy teens will poke a little fun at the bear. When Tammemägi showcased his updated Roobarb series at a preview screening, he remembers the industry people loved it—but they were adults. "Nostalgia means something to parents and buyers," Tammemägi adds. "As soon as you get it on air, it has no relevance to children." So for him the true question becomes: Who are you ultimately making it for?

Finding reason for revivals

When the original *Magic School Bus* was first born as a book series, it met a need to introduce a fun way to teach kids about science—particularly girls and minorities, says Scholastic's Schaefer. "As we looked today, when we were evaluating whether it made sense to do a new *Magic School Bus*, it was the same evaluation process, where we saw that STEM learning is a really important concern right now."

In 2009, the US ranked 25th in math, according to a global assessment administered by the Organization for Economic Cooperation and Development (OECD). By 2012, the US had dropped to 31st. Similarly, the US ranked 20th in science back in 2009, but dropped to 24th in three years.

Parents and teachers had also been asking Scholastic for new *Magic School Bus* episodes, Schaefer says. "The numbers were just a confirmation that there's a need."

Arguably, Cartoon Network has even more '90s classics than Scholastic to refurbish—*Johnny Bravo* or *Dexter's Laboratory* come to mind. And while they're from the same era as *Powerpuff Girls*, the net believes there's more to staging a reboot than simply grabbing any well-remembered show from the past.

"We looked at the trends and gaps in the marketplace right now, and there's a void out there of new strong girls properties," says Pete Yoder, CNE VP of consumer products for North America. With more than two million Facebook fans, *Powerpuff Girls* has already established rapport with the social media-savvy generation. Yoder adds that not only will opportunity exist for a robust program of online content and apps, but there will also be lots of CP opportunities, particularly around apparel with a program focused on finding fashion designers who can reinterpret the franchise for today's audience.

And DreamWorks Animation is reaching even further back—way, way back. It recently acquired Felix the Cat, which first appeared in 1919—and not solely to put the feline back on the big screen. "We plan to make him one of the most desired fashion brands in the world," said DreamWorks CEO Jeffrey Katzenberg at Licensing Show in June.



Created in 1919, DreamWorks is betting Felix the Cat will resonate with this generation of tweens and teens

The purchase, in fact, comes on the heels of Felix finding a home on higher-end apparel in fashion-forward countries like South Korea. "We've inherited a brand where the next year's worth of creative is already done," says Michael Connolly, head of global consumer products at DreamWorks. "It's literally cut-and-paste."

In addition to Felix's sartorial potential, his revival comes at a time when IPs based on cats are among the bestselling for girls. Think Hello Kitty or newcomer Grumpy Cat. Then there's Felix's black-and-white look, which has remained recognizable throughout his near 100 years of existence. "Very few characters have been historically made in a way that symmetrically looks fantastic on merchandise," says Connolly. "You've got Mickey Mouse, which looks fantastic. You've got your Hello Kitty. Outside of those two, every potential of reinvention to create this beautiful symmetrical vintage-feeling character has been lost."

Toying with the right timing

Being remembered by retail buyers is one thing. Being loved by the right demo is another. The most successful revivals for that all-important toy category, according to BMO Capital Markets analyst Gerrick Johnson, are those franchises that were popular roughly 20 to 25 years ago. "The parents of today were kids back when those properties were popular," he says. "So you get the parents saying, 'Hey, I loved *Transformers* when I was a kid, so you're going to love it, too.'" It's tough to argue with the success of Hasbro's *Transformers* reboot on toy shelves or at the box office. The first of four movies that relaunched the franchise bowed in 2007, exactly 23 years after the *Transformers* TV series and toys first launched in 1984. A 10-year-old boy who loved the original, for example, would have been 33 years old at the time of the reboot, and perhaps had a few young children who he persuaded to watch the Autobots and Decepticons do battle. This year's fourth theatrical instalment, meanwhile, was the first movie of 2014 to crack the US\$1-billion mark in global ticket sales.

Timing may not be on every franchise's side, however. Take *Speed Racer*, for example. The Japanese series about the world's top racing champion with his high-tech car was hugely popular when it first launched in 1967. For its 2008 movie revival, the Wachowski siblings were tapped to direct, fresh off their successful groundbreaking *Matrix* trilogy. Despite an existing *Speed Racer* fan base and proven directors, the reboot crashed on retail shelves for master toy licensee Mattel.

"The toys did not sell at all. They were the biggest stiff in the world," Johnson says. "Why was that? It's because *Speed Racer* was popular in the '60s and early '70s. In 2008, none of those kids' parents even knew what *Speed Racer* was. It was the crazy uncle or the grandfather who did."

So does this spell trouble for a property like Britain's *The Clangers*, which first appeared in 1969? Not necessarily. A recent poll conducted by Radio Times and the British Film Institute voted the property's characters as

the third-best BBC kids characters from the '60s, and a new series will be back next year with BBC Worldwide as the international distributor.

The Clangers owner Coolabi Group is already well underway with signing licensing deals for the 45-year-old property that will be modernized for a new generation of British kids in its debut next spring. Coolabi tapped Immediate Media to create a standalone Clangers magazine title, while Gemma International will create and distribute a range of Clangers greeting cards and gift wrap. There will also be Clangers umbrellas and purses, thanks to Trade Mark Collections. "Even if [retail] buyers don't remember it from the first time around, we can make sure they're aware it's something that's been around before," says Steve Perry, a product development manager at MV Sports, whose company is producing Clangers-themed scooters and trikes. "We know the history of the brands, and in the current climate a lot of retailers are looking for safe properties."

On the flip side, some franchises appear almost too young to be a "classic" ready for a comeback. *Powerpuff Girls*, for example, first flew onto Cartoon Network in 1995. Blossom, Bubbles and Buttercup have since had their own movie release in 2002, while the original series' run ended less than a decade ago. At Licensing Show, CNE announced that the trio will return again to fight crime before bedtime starting in 2016. When reaching for a new audience, however, the relaunched *Powerpuff Girls* may not have the luxury of parents who will introduce the show to their offspring. "It's new to kids, but hasn't been gone long enough for those kids who played with it in the late '90s to have children of their own now," says Johnson. "Some things have to be put away long enough so that a generation of kids are not exposed to it."

And what does all this mean for a property like Felix the Cat, which first rose to fame during the silent film era? "It's almost a blessing in disguise that [Generation Y] doesn't remember him," says Connolly. "We know Felix the Cat, his best friend is Kitty, he has a bag of magic tricks, and he's funny. With those being your parameters, everything else can be touched upon or evolved and driven to the cool factor."

DreamWorks' initial program for Felix won't target young kids, however, but rather tweens, teens and adults. The plan is to also keep products in upper-echelon retailers before signing an exclusive agreement with a higher-end mass retailer. "We don't want to homogenize Felix," says Connolly. "We want to make buying a Felix product an event...and a little bit of a treasure hunt."

Out from under the clutter


Angry Birds was born from an app game and now has its own TV shows, apps, videogames and activity parks. YouTube stars can become celebrities. There is no shortage of ways for consumers to find and engage with new content. And in this climate, licensors reviving classics contend that these storied IPs offer instant recognition.



Once accessorized with an eyepatch, the new Danger Mouse will don an iPatch

"Tried-and-true brands help break through the clutter," notes Fremantle's Glankler.

But the TV-driven properties discussed here need more than just nostalgia and brand recognition. They need strong storytelling that resonates with viewers of the current generation. Reruns simply won't do. For example, in addition to the new gadgets, *Danger Mouse* is bringing aboard an independent female character—something that wasn't prevalent for the '80s show. "Having a female voice, just as strong and capable as Danger Mouse, is critical in our storytelling," Glankler says. Meanwhile *Powerpuff Girls*, already relatively modern with its strong female characters, will see an updated animation style that resonates better with today's kids. What those changes will be, however, remains to be seen.

"There's a lot of pressure because everyone remembers what a great show it was," says CNE's Yoder. "No one wants to be the one who touched *Powerpuff Girls* and screwed it up." 

The good, bad and ugly of pan-Euro licensing deals, discount-tier retailers and German grocers are just a few of the topics attendees will be buzzing about at Europe's biggest licensing event in October. Read about them here first.



BY GARY RUSAK

Brand Licensing Europe is now the anchor event for a growing licensing market that stretches from the UK to the far reaches of southern Europe, Russia—and beyond. Heading into this year's event, the rise of the value retail tier and the success of IPs from humble origins are a few of the positives in a largely risk-averse landscape still defined by the concentration of retail and licensor power.

Taking stock of pan-Euro deals

The crucial question every IP owner faces when considering European-wide distribution is whether or not to take advantage of the growing consolidation of licensees and manufacturers and sign comprehensive distribution deals, or opt for another approach. Recently, the industry has seen the emergence of mega-licensees such as Hong Kong-based Li & Fung. The multi-billion-dollar company has followed an acquisition strategy in the last few years through which it has purchased multiple manufacturers, including Hong Kong-based Loyaltex Apparel and Germany's TVMania, and licensing agencies like The Licensing Company (TLC). The rapid European expansion of UK-based softlines licensee Character World is another example of a new breed of licensee capable of offering licensors attractive pan-European deals.

"There has been consolidation in manufacturing, in general, a trend towards mergers and acquisitions," says Richard Goldsmith, EVP of global distribution and international consumer products at The Jim Henson Company. "The low interest rates make it a good time to borrow money and grow in that way."

On the plus side, a more robust licensee, much like a larger licensor, has more heft in the marketplace and is able to leverage its deep and long-standing retail relationships to get products on the shelves.

"When licensees consolidate, they are able to bring their economies of scale together," notes Simon Phillips, EVP & GM of Disney Consumer Products EMEA. "They can look at distribution across multiple territories and pull all their creative resources together."

And the appeal of a comprehensive deal for the top licensors is obvious. "Li & Fung has been very ambitious so it can offer shorter lead times now," says James Walker, VP for EMEA and APAC brand licensing and publishing at Hasbro. He adds that pan-European licensees enable Hasbro to meet increasingly shorter retail delivery windows. "Consumers always want more, more, more, for less, less, less and quicker, quicker, quicker," he says, describing the retail axiom that encourages licensors to place extra value on manufacturing and distribution efficiencies.

The BLE primer



While Frozen's CP program remains red-hot, Elsa's owner Disney is forecasting even more sales growth for licenses in the value tier of Euro retail

Andrew Carley, head of global licensing at Entertainment One (eOne), agrees that the advantages of pan-Euro deals are evident. "It's one contract and one set of approvals," he says. "It's much easier for a licensor to make that one deal and get distribution for a product and source it from only one company." Carley also notes that EU treaty rules, which allow for tariff-free trade, can often make strict single-territory agreements between licensees unenforceable.

"The markets are becoming smaller and smaller," says Annalisa Woods, commercial director of Ink Global, a Denmark-based licensing agency. "If a retailer wants to buy from a specific licensee, because of the Treaty of Rome, we can't really stop them."

Caveat emptor

That said, many IP owners know all too well that taking the easy route might not deliver the best results. "With every deal you have to ask that question," explains Rob Corney, group MD of UK-based Bulldog Licensing. "Is your brand one that you want to be another player in a massive portfolio, or would you rather choose a smaller company where you are a bigger player?"

It's an age-old quandary that Ink's Wood faces in relation to the agency's efforts to grow its Masha and The Bear and Subway Surfers properties across Europe in 2015. "If

you sign a multi-territory deal, you take the risk that your property is not getting attention in certain markets," she says. "That happens if you let certain territories get swept into the deal without doing your due diligence. You have to be extremely careful because it happens more and more."

An example of this one-size-doesn't-fit-all approach on the agency side of the equation is Italy-based Rainbow Group's recent move to end its agreement with Nickelodeon UK, which had repped Winx Club in the territory. Instead, the company has opted for a yet-to-be-named smaller, boutique fashion-oriented firm to steer the IP.

"Nick is obviously a strong company and a great broadcast partner, but we mutually decided that Winx is something different from SpongeBob or Dora," says Antonella Ceraso, senior country manager at Rainbow. "We decided with Nick that we needed another agent for the UK."

With its efforts to further expand its visibility and footprint in the UK, US and Chinese markets in 2015, Rainbow is looking for licensees and agents that take a tailored approach. "If you go to your pan-European licensee and it manages 30 different properties, you are just one of them," says Ceraso. "When it has only three or four IPs, that is more appealing. Sometimes you have to go with a smaller company."

Another pitfall of sweeping pan-European deals is that the licensee's distribution network might not be as robust as promised. "For us, it has to be a good case made," says eOne's Carley. "It is very easy for distributors and suppliers to say they have pan-European distribution, but when you drill down and ask specific questions, you can see there is a weakness there. The reality is that there really aren't that many companies that can rightfully offer that kind of distribution."

Woods also posits that there are no shortcuts to be taken when it comes to retail distribution and that every deal, no matter its size, has to be carefully vetted. "When we sign a multi-territory deal we go through a forecast process for every territory that is involved," she says. "If we find a territory that is not performing for a distributor, then we have to pull it out."

For example, in May, Ink signed a master toy deal with German-based conglomerate Simba Dickie Group for Masha and The Bear to produce a range of plush, construction, wooden toys, summer toys, wheeled toys and arts and crafts. The deal covers Eastern Europe, GAS, Iberia, the Nordics, Benelux, France, Italy and the UK. "There are many European territories on that deal," says Wood. "But we went through a very strict process to make sure that they have good local distribution in place for all the territories."

In for a penny...

Another trend on the horizon for BLE attendees is the rise of discount and grocery chains in multiple European territories, and the resulting boost for licensed categories that feed this value tier of retail. "I've noticed it across



Nick just sealed its first deal with UK-based Appy Drinks, which will place SpongeBob and TMNT beverages at discount retailer Poundland

Europe," says Woods, "Southern Europe is becoming a value chain stronghold."

Disney's Philips, representing the largest entertainment licensor in the world, has taken note of the trend. "The value sector has impacted everybody," he says. "These retailers offer incredible value to their consumers and we're very excited to see how we can continue to grow our business in the channel."

The most striking examples of the value tier's growing prowess can be found in the UK. Leading names in the category include Willenhall, England-based Poundland. Founded in 1990, the chain currently boasts more than 450 locations across the UK and yearly gross revenues exceeding US\$1.4 billion. About two million customers visit Poundland's locations on a daily basis. Meanwhile, the chain's closest competitor—and rival in this past summer's well-publicized price war—is 99P Stores. The Northamptonshire-based chain has also experienced rapid growth since rolling out in 2001. The retailer reportedly pulls in more than two million customers a week throughout its 220 UK locations.

There is a pretty self-evident line that can be drawn between the prolonged economic downturn and the rise of value retailers. In the wake of the economic downturn that started in 2008, consumers have embraced the retail tier, throwing off their previous ideas about product quality and variety. Growth has followed, resulting in the opening up of more shelf space for licensed goods throughout the tier.

"Five years ago, you might have heard someone talk about how much they have paid for their watch or t-shirt, but today you are just as likely to hear the same person taking pride in how much they saved by shopping cheap," surmises Corney.

Tim Collins, head of commercial at UK-based entertainment publishing company DC Thomson & Co., agrees that there has been paradigm shift in consumer attitudes. "There was a perception that the value tier was for those on income support," he says. "But now you can drive a hard bargain while driving your Mercedes, and no one thinks that it is an odd proposition. Paying less is not considered a bad thing."

Not surprisingly, many expect that sales for the product categories suited to the value tier will grow. "We are looking at the value sector more aggressively than in the past," says Collins. "There are some licensors who might think because of the high volumes and smaller margins that it's not a sector we can compete in, but I believe it is here to stay."

Steve Manners, EVP at pan-Euro agency CPLG, adds that although the slim margins and lower price-points might shrink royalty rates for the sector, its double-digit growth can't be ignored. "It has become an important distribution channel," he states bluntly.

The categories that have benefited from this trend are Fast Moving Consumer Goods (FMCG) including toiletries, publishing and confectionery. In fact, many licensors and agents report they are heading to BLE in October with this in mind. And you can expect to see more partnerships in the future like Nickelodeon's recently announced deal for a new line of SpongeBob SquarePants and Teenage Mutant Ninja Turtle drink boxes with London-based Appy Drinks. The new SKUs are earmarked for distribution in Poundland stores across the UK starting in 2015.

The rise of German grocers

Further driving the growth in this tier is the outstanding performance of Europe-based grocery retailers Lidl and Aldi, which have made their presence known in the UK market.

According to the *Financial Times*, the UK arms of Essen, Germany-based Aldi and Neckarsulm, Germany-based Lidl are on track to generate combined sales of more than US\$16 billion in 2014. Aldi is expected to generate US\$8.29 billion, representing fairly remarkable sales growth of roughly 28% over the last year.

"They do amazing promotions in the grocery sector," says Mark Kingston, GM & SVP of Nickelodeon & Viacom Consumer Products. "They are nimble retailers experiencing phenomenal growth, and they are starting to open up to stocking more and more licensed goods."

Bruno Schwobthaler, SVP at Warner Bros. Consumer Products, says the rise of these chains across Europe has bolstered his company's already strong position in the food category. "Food and promotions have become very significant for us," he says, pointing to WBCP-owned Looney Tunes' long history in the sector. "We expect that more industries and companies [in the food and promotions category] will turn to licensing in the next three years."

What it all adds up to is value-based grocery retailers having a larger presence at London's Olympia exhibition center in October. Their buyers are expected to walk the aisles of BLE hunting for licenses to fill their shelves and appeal to their growing customer base.

The whole zoo

Retail growth is all well and good, but many licensors are well aware of the fact that they still have to convince retail buyers that their smaller IPs can compete with the big boys. "It's not like the elephant in the room anymore," explains DC Thompson's Collins. "It is the whole zoo."

Of course, he is referring to Disney Consumer Products and its ever-increasing market share. The company will hit BLE with a comprehensive portfolio augmented through a spate of acquisitions made over the last five years. With the addition of blue-chip IPs Star Wars and Marvel, Disney has expanded its dominance from the girls aisle to boy-centric brands—and the hits just keep on coming, too.

"*Guardians of the Galaxy* is on fire," says Philips, referring to the most recent blockbuster from Disney-owned Marvel Studios that raked in US\$250 million in its first three weeks of release in August. And with a new Star Wars movie—and its expected licensing bonanza—on the horizon at the end of 2015, Disney is arguably more powerful than ever when it comes to commanding retail distribution.

Hasbro, another heavyweight, has also continued winning its big property bets with the international success of *Transformers 4*. By the end of August, the CGI spectacle had broken the US\$1-billion mark at international box office and was continuing to sell tickets. "It's a phenomenal result for us," says Walker. "You'll see us give it a little more European focus in the future and continue to produce content, including a new series called *Transformers: Robots in Disguise* (scheduled to bow in spring 2015) and a new *Transformers 5* movie down the line."

Hasbro has also leveraged its market share to broker a new deal with Finnish digital entertainment company Rovio for the release of *Angry Birds Transformers*, expected in Q4. It's a slick combination of resonant IPs that Walker believes will pay major dividends. "We are creating a new game, rather than skinning an old one," he reveals. "It's being executed phenomenally."

For Viacom-owned Nickelodeon, the upcoming year also looks promising with a *SpongeBob SquarePants* movie rolling out internationally throughout Q1 2015. Other bright spots for the powerful licensor include the renewed strength of *Teenage Mutant Ninja Turtles* across Asia, and the expansion of the *Dora* franchise with *Dora and Friends*.

Peppa power

There is, however, a striking example of an IP with more modest origins finding mass success in Europe—the result of a carefully thought-out strategy marked by territory sensitivities, shrewd category choices and innovative licensees. eOne's preschool property *Peppa Pig* marks her 10th anniversary this year, and the affable piglet is now breathing the rarified air of true licensing success.

"Peppa Pig is number one in Italy," says NPD European analyst Frédérique Tutt. "It is also ranking very high in Spain and it's almost considered an evergreen now in the UK. In fact, if you take the top five countries in Europe, Pep-


pa [product sales] have experienced a 49% increase over the first six months in 2014."

The secret to the property's success, says Carley, is a commodity that is all too often in short supply in the licensing world. "Patience," he contends. "We understand the IP and trust it. We let it breathe and let consumers find it and understand it before we ramp up the heavy marketing."

Additionally, Carley credits the expertise of local agents—who know the ins and outs of their specific territories—for creating the robust *Peppa* program. "It's a lot of work," he says. "But our philosophy is to understand the market."

For example, Carley says it has taken almost a full decade for the UK market to mature enough to introduce *Peppa* FMCG products. The category, aided by the aforementioned growth in the value tier, is just starting to be an area of focus for eOne. "But we found that the enthusiasm for FMCG in southern Europe started almost right away," he notes. "It's just a consumer culture there that was faster to accept it."

eOne also can't over-emphasize the importance of tailoring the program to the territory. As just one example, while the SKUs in the UK market primarily target preschool girls with *Peppa*-focused products, in Southern Europe the boy-skewing program that puts *Peppa*'s little brother George in the spotlight is finding slightly more traction.

Despite the rash of licensee, licensor and retail consolidation, Carley still believes that along with a measured, patient and territory-specific approach, unique content can still propel an IP towards success. "The content has to be the number-one priority," he says. "If the content is right, kids will find it and stick with it." 

Even though *Peppa Pig*'s a perennial success in the UK, the eOne-owned property is only just making its way into FMCG categories in that territory



I'm thinking I've seen **David Tennant of Doctor Who** every five minutes. It takes **nerves of steel** to take on a **classic property**. It's not meant to be entertainment. **It's hard fun**. Of course I immediately ran to the **Lego Death Star**.

Looking back, I think I could have been **Robert LePage**.

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